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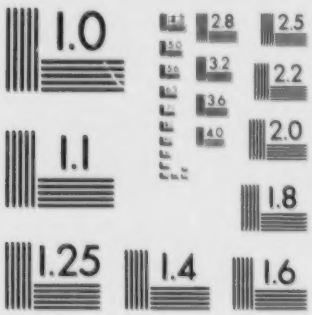

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Canada Mortgage and Housing Corporation
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CMHC Helping to house Canadians

GARDEN SUITES DEMONSTRATION

- NATIONAL SURVEY -

GARDEN SUITES DEMONSTRATION

- NATIONAL SURVEY -

(Volume I: Detailed Findings)

April 24, 1989

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EXECUTIVE SUMMARY

A. BACKGROUND

Over the next three decades, the proportion of the population over 65 years of age will double to the point where it will represent some 20% of the total. Such growth will be accompanied by increased demand for public funding of support services, institutional care and housing. Specifically, the elderly may seek a broader range of housing options than is currently available.

In response, Canada Mortgage and Housing Corporation (CMHC), in cooperation with the Canadian manufactured housing industry, is considering a concept pioneered in Australia but largely unproven in Canada -- the garden suite or "granny flat". These suites are small, self-contained houses placed on the same property lot as the home of a close family member. They allow occupants to be independent and maintain their privacy, while being close to their children. The units are factory-built, include all the amenities of a house, and are not intended as permanent additions to the lot but to be moved easily.

As a vital part of assessing this housing option for elderly Canadians, a national market survey was undertaken by Gallup Canada, Inc. on behalf of CMHC. The survey was intended to provide key information in the development of CMHC policy options and to identify regulatory and marketing issues that need to be considered.

The survey was conducted by telephone among 780 potential garden suite occupants, aged 60 years or older, and 1,182 potential hosts under the age of 60. The 1,962 adults interviewed included both a national random sample of respondents (1,485) and a sample of individuals who had visited a demonstration of garden suites (477).

GARDEN SUITES DEMONSTRATION
- NATIONAL SURVEY -

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B. KEY FINDINGS

Potential Market

* Survey results permitted an estimate of the total potential market size for garden suites. This is defined as households meeting the objective demographic criteria of garden suite users based on factors of age, kinship, home ownership and lot size. The size of the potential occupant market across Canada is estimated to be between 1.01 million and 1.05 million households. This represents approximately 45% of all Canadian households headed by individuals aged 60 or older. The estimated size of the potential host market across Canada is between 2.62 million and 2.70 million. That is, approximately 40% of all Canadian households headed by individuals aged 18 - 59 qualify as potential host families. These findings are based on 1986 demographic statistics and do not cover the potential growth of this market as the Canadian population ages.

* On the other hand, these figures tend to reflect the upper limits of possible market demand as they include eligible buyers who currently show little interest in the concept of garden suites. Likely demand, based on current levels of interest, is discussed in the following section of this summary.

* The largest absolute numbers of potential hosts and occupants are located in Ontario and Quebec, followed by British Columbia and Alberta.

* Almost half (45%) of the national market lies in rural communities of 10,000 residents or less, with 15% in communities of 10,000 - 100,000, 13% in areas of 100,000 -- 500,000 residents, and 27% in large urban centres with populations of 500,000 or more.

- At a national level, including both occupants and hosts, the predominant characteristics of the potential market show them to be primarily married *individuals (80%), anglophones (75%), women (59%), those with high school level education (48%), residents of rural communities (under 10,000 - 45%) and individuals at all levels of income.

- Among potential occupants, the predominant age group is between 60 - 69 (68%). Among potential hosts, the majority fall between the ages of 30 - 49 (73%), most have 3 - 4 people living in their household (57%) and are likely to have children living at home (67%).

- The profiles of regional markets differed on the basis of language, urban-rural distribution, education, income, and household composition.

- Approximately one-third of the potential market for garden suites are aware of the concept. Those least likely to be aware of garden suites include francophones, residents of Quebec and New Brunswick, young people, singles, and the less educated.

Likelihood of Use and Preferred Location

- About half of potential occupants at a national level are likely to want to live in a garden suite. The most positive response is in British Columbia (68%). Likelihood is perceived as much higher among demonstration visitors (72%).

- The most common barriers reported were the existence of current housing which meets their needs, a desire to maintain independence and geographical distances between potential occupants and host families.

- Close to one-third (29%) of potential hosts felt tha: they were likely to install a garden suite. This translates the total potential market of 2.66 million host families into a more likely market of 772,000. The main reasons for not wanting to install one was the small size of their lot, the cost involved and the fact that their parents already owned a home.

- The preferred location overall for garden suites, among both potential occupants and hosts, is on the current property of the children, although other options were preferred by a substantial minority of respondents. However, potential occupants were also asked to consider their own personal situation, what they had learned about the garden suite concept and to indicate where they would be most likely to live. In this case, a plurality of potential occupants felt that it was more likely that a garden suite would be located on their own property, with their children occupying the principal residence.

- The most common reason for this was a desire by potential occupants to maintain freedom and independence.

- Only 24% of respondents at the national level felt that there would be a problem with neighbour acceptance of garden suites.

- Many respondents felt that their lots could adequately accommodate the units without disruption to the neighbourhood and that their neighbours were nice and wouldn't mind.

- A small minority of respondents felt that neighbours might object, that there were potential legal problems or that garden suites might have a negative impact on property values.

Reaction to Garden Suite Designs

- 87% of respondents from the national random sample were impressed with garden suites in general. Those who had visited a demonstration of garden suites were the most impressed with the concept. No meaningful differences of opinion were found across potential hosts and occupants in this respect.

- Francophones, residents of Quebec and singles were the least likely to be impressed by garden suites.

- Among the specific designs presented to respondents, the British Columbia model was the most popular (the choice of 53% of respondents), followed by the Quebec design (15%) and the Ontario model (6%).

- Preference for the British Columbia model was closely related to the attractiveness of its exterior appearance and general design. Preference of the Quebec model was associated with its layout/floor plan, facilities, available space and perceived comfort. The Ontario model was generally preferred for its layout and its overall shape and size.

- Overall ratings of garden suite features were typically very positive. Specific dislikes about garden suite designs were very idiosyncratic.

- The sizes of the kitchens, bedrooms and living rooms were generally seen as adequate. A strong component of the potential market felt that it was important to offer a wide variety of model types, to provide more storage space and an attractive exterior appearance. Respondents were split over the need for a second bedroom.

Special Needs of Occupants

- 85% of elderly Canadians who are considered potential occupants of garden suites describe their health in positive terms.

- The vast majority of potential occupants also believe that the garden suite would allow them the level of comfort they are personally seeking in housing and the majority of hosts felt it would meet the comfort level they perceive necessary for their parents.

- Potential occupants in Quebec and Manitoba were the least likely to believe that garden suites would be comfortable for them.

- Major reasons for concern about life in a garden suite were the small size of the units (39%), a preference for an existing residence (26%) and concern over a loss of independence (18%).

- 17% of respondents believed that no additional support services are necessary.

- For those who did feel they were necessary, the most frequent services mentioned were quick response in case of emergency (68%), transportation on call when necessary (52%), health care (48%), homecare (42%), special services for the impaired (41%) and personal care (40%).

Price Sensitivity

- 46% of respondents stated a preference to purchase garden suites, with 38% preferring to rent and the balance (16%) not stating a preference.

- New Brunswick residents were among the most likely to buy (56%). Quebec residents were the most likely to rent (53%).

- About half of respondents overall, including both hosts and occupants, felt that the proposed purchase price was about right. Only 29% felt that the proposed rental price was about right.

- Residents of Quebec and rural communities were among the most likely to find both purchase prices and rental prices high.

- Nevertheless, approximately two-thirds of respondents, whether potential occupant or host, felt they could afford the purchase and rental prices quoted to them.

C. IMPLICATIONS

- Approximately 2.66 million properties are potentially available to accommodate garden suites across Canada.

- While the total market potential is large, the current level of interest in the garden suite indicates that the likely market demand will be much smaller. Based on current levels of interest, it is estimated that 772,000 host families are likely to install a garden suite on their property, with 213,000 being very likely to do so. Communications will be crucial to increasing these numbers and penetrating the much larger potential market.

- The perceived likelihood of actual use of garden suites is much stronger among potential occupants than potential hosts. Efforts towards "selling" the concept may have to be stronger for the latter. For potential occupants, the

message of continued independence and freedom which garden suites offer should be emphasized. For potential hosts, messages should be more practical - addressing issues of lot size and space requirements as well as cost.

- While provinces vary in terms of potential market strength, each show a firm base of potential hosts and occupants. Minimally, however, national communications efforts should include the large markets of Ontario, Quebec, British Columbia and Alberta.

- The socio-demographic profiles developed in the study will provide important insights for developing targetted promotional and marketing campaigns both at the national and regional level.

- Awareness building will be an important consideration for future marketing efforts, particularly among francophones and residents of Quebec and New Brunswick.

- Overall, there is a positive reaction to the concept of garden suites for elderly Canadians, among both potential hosts and occupants. The idea is not completely sold, however. Marketing may require special efforts towards francophones and residents of Quebec, in general.

- Ratings of specific features were also generally positive. Exterior appearance is a salient issue to potential garden suite users and shows room for improvement of current designs. Increased storage space will also be important overall. Detailed findings also suggest specific improvements for each of the current models.

- While potential occupants largely consider themselves healthy and perceive the suite as offering the level of comfort they are personally seeking, there remains a strong belief that support services will be required to assure their comfort.

- The extent to which these services are available may prove to be a salient feature in the marketability of this housing option.

- It will be important to offer both purchase and rental options to potential garden suite users in all regions.

- While prices are generally seen as affordable, different pricing options will likely be required to accommodate different segments of the potential market.

I. INTRODUCTION

A. BACKGROUND AND OBJECTIVES

In cooperation with major segments of the Canadian manufactured housing industry, Canada Mortgage and Housing Corporation (CMHC) has examined a housing option for elderly Canadians -- the garden suite. As a vital part of this assessment, a national market survey has been undertaken to provide key information in the development of CMHC policy options and the identification of regulatory and marketing issues that need to be considered.

Over the next three decades, the proportion of the population over 65 years of age will double to the point where it will represent some 20% of the total. Such growth will be accompanied by increased demand for public funding of support services, institutional care and housing. Specifically, the elderly may seek a broader range of housing options than is currently available. Important criteria for such housing can be expected to be affordability and the ability to maintain personal independence.

In response, CMHC and the industry are considering a concept pioneered in Australia but largely unproven in Canada -- the garden suite or "granny suites". These suites are small, self-contained houses placed on the same property lot as the home of a close family member. They allow occupants to be independent, maintaining their privacy, while being close to their children. The units are factory-built, include all the amenities of a house, and are not intended as permanent additions to the lot but to be moved easily.

This interpretative report provides the detailed findings of a national telephone survey conducted by Gallup Canada, Inc. to evaluate the concept and its marketability in a Canadian setting.

The survey investigated a number of specific issues including:

- concept awareness among Canadians;
- potential market size for garden suites Canada-wide and by province;
- comparative market strengths both in urban and rural areas;
- demographic profile of respondents -- age, marital status, income level, health/fitness status, and rural or urban residence;
- reactions to the garden suite designs and facilities -- adequacy of space, interior layout and finishes, and attractiveness of the exterior;
- reasons for accepting or rejecting this housing option, including economic considerations;
- availability and suitability of lots for placement of garden suites; and
- the need for and availability of support services for such housing.

B. OVERVIEW OF OUR METHODOLOGY

The data for this interpretative report are drawn from a national telephone survey. Our methodological approach is discussed in detail below:

- The study population was comprised of potential occupants and potential hosts with the former limited to people already 60 years old or over and the latter limited to those with close relatives already 60 years of age or over.

All respondents either own (potential hosts) or have children who own (potential occupants) a detached or semi-detached home with enough property to accommodate an additional building the size of a double garage;

- In addition, two sample groups were drawn from the study population:

  i) Visitor Sample, containing those individuals (potential occupants and potential hosts) who had previously visited a garden suite demonstration unit and completed an on-site questionnaire agreeing to be interviewed at a later date, and

  ii) Random Sample containing individuals (potential occupants and potential hosts) randomly selected from the general population based on a random seed methodology in which the telephone numbers are randomly generated from seed telephone numbers; seed numbers were stratified by community size to ensure that numbers matched the population distribution across communities in each province;

- The number of total observations reflect the need to provide information on a provincial basis;

- Four draft questionnaires were prepared and reviewed with CMHC; these were pretested with real respondents simulating the exact set of procedures to be used in the survey; following these procedures the questionnaires were finalized (questionnaires are attached as Appendix I);

- Fieldwork was carried out across Canada between July 28 and September 12, 1988. To ensure the necessary reliability in provincial observations, additional fieldwork was undertaken between January 4 - 26, 1989;

EXHIBIT 1.1

SAMPLE DISPOSITION

	Random	Visitor
TOTAL POSSIBLE:	29,995	3,218
Reasons for:		
DISQUALIFICATIONS		
Not reached	5,638	1,375
Not in service	6,416	313
Business number	1,810	19
Refusal	2,763	126
Age	5,976	121
Language, hearing problem	506	3
Wrong number	-	105
Does not recall visit	-	90
Terminated part way	69	1
No parents living of correct age	468	45
Senior has no children	358	56
Property qualification	2,849	288
Refused to participate in follow-up	285	20
Agreed to participate but did not	795	121
Other reasons for non-compliance	577	58
COMPLETED INTERVIEWS	1,485	477

- A total of 1,962 interviews were completed:

  i) Visitor Sample: (477 interviews)
  Occupant - 178
  Host - 299

  ii) Random Sample: (1,485 interviews)
  Occupant - 602
  Host - 883

  It should be noted that a total of 33,213 attempts were made to secure the 1,962 interviews as displayed in Exhibit 1.1; Exhibit 1.2 shows the overall sample design.

- For the Visitor Sample, aggregate survey results are accurate to within at least plus or minus 4.5 percentage points, 19 times out of 20. Disaggregating the results diminishes accuracy to plus or minus 7.3 percentage points for occupants and to plus or minus 5.7 percentage points for hosts;

- For the Random Sample, aggregate survey results are accurate to within at least plus or minus 2.5 percentage points, 19 times out of 20. Disaggregating the results diminishes accuracy to plus or minus 4.0 percentage points for occupants and to plus or minus 3.3 percentage points for hosts; and

- For results based on subsets of these groups, levels of accuracy will vary according to the size of the group involved. The Technical Appendices provide a reference table for determining levels of accuracy for various sub-samples.

EXHIBIT 1.2

SAMPLE DESIGN

	Random		Visitor		
	Occupant	Host	Occupant	Host	Total
British Columbia	36	57	22	40	155
Alberta	56	90	36	70	252
Saskatchewan	38	59	24	48	169
Manitoba	36	58	31	10	135
Ontario	258	376	9	18	661
Quebec	65	81	22	63	231
New Brunswick	27	61	8	17	113
Nova Scotia	49	55	11	5	120
Prince Edward Island	9	5	1	0	15
Newfoundland	28	39	14	28	109
TOTAL	602	883*	178	299	1,962*

* Includes two interviews for which the province was not identified

C. ORGANIZATION OF THE REPORT

The balance of this report highlights the key findings and related implications for the research issues being addressed. Specifically:

- Chapter II identifies the total potential market for garden suites, examining in turn the overall size of potential markets, the socio-demographic profile of the consumer and the level of product awareness;

- Chapter III reviews the likelihood of use and preferred location of garden suites. This chapter thus translates the total market potential into the more probable market demand that can be expected for garden suites based on reported levels of interest in the concept. In addition to the opinions of potential occupants and potential hosts, we present the perceived acceptance of such housing by neighbours;

- Chapter IV assesses the reaction to garden suite designs from general impressions to design preferences. The importance of and ratings assigned to specific features are detailed;

- Chapter V outlines the specialized needs of occupants, identifying the extent to which the suites adequately meet these needs and examining the issue of ancillary services;

- Chapter VI examines the price sensitivity of garden suites, discussing the preferences for buying or renting. Here, we consider the affordability of either option and analyze consumer reaction to relative market prices for either the purchase or monthly rent;

- Chapter VII summarizes the key findings and their implications; and

- Volume II, Technical Appendices, presents the survey methodology along with detailed statistical tables.

II. TOTAL POTENTIAL MARKET FOR GARDEN SUITES

The potential market for garden suites can be conceptualized in two ways:

1 - those who meet objective demographic criteria of potential garden suite users (i.e., factors of age, kinship, home ownership and lot size); and

2 - those who meet the objective criteria, but also demonstrate a subjective interest in the product or a likelihood of using it.

This chapter is based on the first, broader concept which we have called the total potential market. It provides detailed estimates of market size as well as a socio-demographic profile of the population involved.

The subsequent chapter addresses the second concept of the likely market by identifying the current level of interest in the garden suite. Finally, the remainder of the report discusses factors which influence acceptance of the garden suite concept and thus examines how greater penetration of the total potential market may be achieved.

A. SIZE OF THE POTENTIAL MARKET

The potential market for garden suites involves two groups simultaneously -- potential occupants of these suites and potential host families who will accommodate garden suites on their properties. For the purposes of this study, these populations have been defined as follows:

- a potential occupant is defined as anyone 60 years of age or older who has at least one child living in Canada who owns a detached or semi-detached house with a lot large enough to accommodate a garden suite; and

- a potential host is defined as an adult under the age of 60 who has at least one parent (or parent-in-law) 60 years of age or older and who owns a detached or semi-detached house with a lot large enough to accommodate a garden suite.

In measuring these populations and estimating the size of the potential market, a number of conceptual considerations must be kept in mind:

- While these definitions exclude certain segments of the total potential market for garden suites, they facilitate the task of measurement and thus allow for an operational, albeit conservative, market assessment;

- While it is important to understand each of these two populations for the purposes of targetted marketing, any estimate of market size must recognize that for every occupant of a Garden Suite, there must be a corresponding host. Thus, each group provides an independent measure of the overall potential market. They are not additive. It should also be borne in mind that the two groups must interact in order to have a market at all;

- While the definitions provided refer to individuals, it is more appropriate to measure the potential market for garden suites in terms of households. That is, the number of Garden Suites potentially marketable is more directly related to the number of households which may potentially host or occupy a Garden Suite than to the number of individuals who may live in a given unit or host property; and

- The potential market, as defined here, does not distinguish between those who have a high or low degree of interest in actually using a garden suite.

EXHIBIT 2.1

NATIONAL ESTIMATES OF POTENTIAL MARKET SIZE

	Potential Hosts	Potential Occupants
Total respondents 18 - 59/60+ (weighted)	3,827	2,410
Total who qualify as potential hosts/ occupants (weighted)	1,524	1,087
% who qualify	39.8%	45.1%
95% confidence interval	±1.6%	±2.0%
Total Canadian households[1] headed by individuals aged 18 - 59/60+	6,688,175	2,281,760
Estimated potential market size	2,661,894	1,029,074
	±42,590	±20,581

[1] Based on Statistics Canada Census data for 1986 excluding Yukon and Northwest Territories.

The level of interest, as well as factors which influence acceptance of the garden suite concept, are analyzed in subsequent chapters of this report.

In order to measure the potential market size for garden suites, a screening questionnaire (see Appendix I) was administered to a random sample of households in each province. The head of each selected household was chosen as the survey respondent. This questionnaire determined the proportion of provincial households who met the criteria of potential occupants or hosts, as defined above. These proportions were applied to provincial household figures (Statistics Canada, 1986 Census) to estimate the actual size of these groups. For national estimates, data were weighted to compensate for slight oversampling in some provinces and slight undersampling in others. A detailed description of the methodology used to estimate the size of the potential market is provided in the Technical Appendices to this study. This includes detailed calculations at the provincial level.

Key Findings

* National estimates of total potential market size, as defined above, are summarized in Exhibit 2.1. The size of the potential occupant market across Canada is estimated to be between 1.01 million and 1.05 million. This represents approximately 45% of all Canadian households headed by individuals aged 60 or older. Given that 71% of potential occupants interviewed were married and 29% were single, widowed, divorced or separated, we estimate that the number of individuals who may potentially live in a Garden Suite number approximately 1.76 million.

* The estimated size of the potential host market across Canada is much larger, ranging from 2.62 million to 2.70 million. Approximately 40% of all

EXHIBIT 2.2
ESTIMATED POTENTIAL OCCUPANT MARKET SIZE BY PROVINCE[1]

	Nfld.	N.S.	N.B.	Québec	Ontario	Manitoba	Sask.	Alberta	B.C.
TOTAL RESPONDENTS 60±	148	247	103	346	997	136	120	164	140
% WHO QUALITY AS POTENTIAL OCCUPANTS	43.2%	44.9%	49.5%	44.8%	41.0%	46.3%	45.0%	55.5%	48.6%
95% CONFIDENCE INTERVAL	±8.0%	±6.3%	±9.7%	±5.2%	±3.1%	±8.4%	±8.9%	±7.6%	±8.3%
HOUSEHOLDS[2] 60+	39,232	85,235	64,022	549,987	850,070	112,722	108,192	167,225	292,762
ESTIMATED POTENTIAL OCCUPANT MARKET	16,948 ±1,356	38,270 ±2,411	31,690 ±3,074	246,394 ±12,812	348,529 ±10,804	52,190 ±4,384	48,686 ±4,333	92,810 ±7,054	142,282 ±11,809

[1] Estimates for PEI not calculable due to small sample size.

[2] Based on 1986 Census data: Refers to number of households headed by individuals aged 60 or older.

Canadian households headed by individuals aged 18 - 59 qualify as potential host families.

* These data can be interpreted to signify that approximately 1.03 million garden suite units are potentially marketable and approximately 2.66 million properties are potentially available to accommodate them. This, of course, is based on 1986 demographic statistics and does not cover the potential growth of this market as the Canadian population ages. On the other hand, these figures tend to reflect the upper limits of possible market demand as they include eligible buyers who currently show little interest in the concept of garden suites.

* Exhibits 2.2 and 2.3 provide provincial estimates of the total potential market for garden suites. The first summarizes estimates for potential occupants and the second addresses potential hosts. Estimates for Prince Edward Island were not calculated as the sample sizes for this province were too small.

* The highest absolute sizes of potential occupant markets are in Ontario (348,529), and Quebec (246,394), followed by British Columbia (142,282) and Alberta (92,810). The smallest markets for potential garden suite occupants are in Newfoundland (16,948), New Brunswick (31,690) and Nova Scotia (38,270). Relative to their respective populations of seniors, however, the provinces showing the highest incidence of potential occupants are Alberta (55.5%), New Brunswick (49.5%) and British Columbia (48.6%). Provinces with the lowest incidence of seniors who qualify as potential occupants include Ontario (41.0%) and Newfoundland (43.2%).

* Similarly, with respect to potential hosts, the largest markets are located in Ontario (841,938) and Quebec (787,899), followed by British Columbia

EXHIBIT 2.3
ESTIMATED POTENTIAL HOST MARKET SIZE BY PROVINCE[1]

	Nfld.	N.S.	N.B.	Québec	Ontario	Manitoba	Sask.	Alberta	B.C.
TOTAL RESPONDENTS 18 - 59	221	344	193	413	1,702	200	187	355	207
% WHO QUALITY AS POTENTIAL HOSTS	43.0%	39.5%	41.5%	43.6%	35.5%	44.5%	44.9%	37.5%	39.6%
95% CONFIDENCE INTERVAL	±6.5%	±5.2%	±7.0%	±4.8%	±2.3%	±6.9%	±7.1%	±5.0%	±6.7%
HOUSEHOLDS[2] 60+	119,843	210,545	167,668	1,807,108	2,371,655	269,618	250,073	668,895	794,363
ESTIMATED POTENTIAL HOST MARKET SIZE	51,532 ±3,350	83,165 ±4,324	69,582 ±4,871	787,899 ±37,812	841,938 ±19,364	119,980 ±8,279	112,283 ±7,972	250,837 ±12,542	314,568 ±21,076

[1] Estimates for PEI not calculable due to small sample size.

[2] Based on 1986 Census data: Refers to number of households headed by individuals aged 18 - 59.

(314,568) and Alberta (250,837). Newfoundland has the smallest absolute size of potential host families (51,532). Relative to the number of their households headed by 18 - 59 year olds, Manitoba and Saskatchewan have the highest incidence of potential hosts (44.5% and 44.9% respectively) and Ontario has the lowest (35.5%).

Implications

- The total potential market for garden suites covers a substantial proportion of the Canadian population. Approximately 45% of elderly Canadian households qualify as potential occupants of Garden suites. Potential host families number 2.66 million across Canada.

- Given that the population of Canadians aged 60 or older are expected to grow in the decades ahead, absolute numbers of potential occupants are also likely to grow. And while the size of the potential host market, as defined in this study, is likely to shrink in the years to come, its current size relative to potential occupants suggests that it will likely continue to exceed the number of potential occupants.

- While provinces vary in terms of potential market strength, each show a firm base of potential hosts and occupants. Minimally, however, national communications efforts directed at either potential occupants or hosts should include the large markets of Ontario, Quebec, British Columbia and Alberta.

- It should be borne in mind that potential users who currently have a high probability of installing a garden suite are smaller in number. The figures reported here reflect the total potential market. The likely market is discussed later.

EXHIBIT 2.4

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL MARKET
- NATIONAL FINDINGS -

	Potential Occupants (%)	Potential Hosts (%)	Total (%)
Age			
18 - 24	-	2	1
25 - 29	-	8	5
30 - 34	-	19	12
35 - 39	-	19	12
40 - 44	-	21	13
45 - 49	-	14	9
50 - 54	-	9	5
55 - 59	-	6	3
60 - 64	38	-	15
65 - 69	30	-	12
70 - 74	17	-	7
75 - 79	9	-	4
80+	6	-	3
Sex			
Female	60	58	59
Male	40	42	41
First Language			
English	72	76	75
French	16	11	13
Other	12	13	13
Marital Status			
Single	1	6	4
Married	71	86	80
Divorced/widowed/ separated	28	6	15
Living as married	*	2	1
BASE (n=)	(602)	(883)	(1,485)

* indicates less than 1%

EXHIBIT 2.4

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL MARKET
- NATIONAL FINDINGS - (Continued)

	Potential Occupants (%)	Potential Hosts (%)	Total (%)
Education			
Public School	23	4	12
Some High School	29	19	23
High School Graduate	22	27	25
College	7	17	13
Some University	6	8	7
University Graduate	10	25	19
Other	2	*	1
Household Income			
Under 15,000	17	5	16
15,000 - 19,999	14		
20,000 - 24,999	12	6	9
25,000 - 29,999	7	9	8
30,000 - 34,999	7	10	9
35,000 - 39,999	4	8	6
40,000 - 44,999	2	10	7
45,000 - 49,999	2	8	5
500,000+	5	34	23
Retired	18	-	7
Community Size			
Under 10,000	45	45	45
10,000 - 99,999	20	13	15
100,000 - 499,999	12	13	13
50,000+	23	29	27
BASE (n=)	(602)	(883)	(1,485)

Gallup

EXHIBIT 2.4

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL MARKET
- NATIONAL FINDINGS - (Continued)

Household Composition	Potential Hosts (%)
Number of People in Household	
One	2
Two	19
Three	20
Four	37
Five	15
Six or more	6
Children Under 10 in Household	
Yes	39
No	58
Children Between 10 and 17	
Yes	40
No	56
Any Children in Household	
Yes	67
No	30
BASE (n=)	(883)

B. SOCIO-DEMOGRAPHIC PROFILE

- This section presents a socio-demographic profile of the potential market for garden suites, as previously defined. Both a national profile and regional profiles are presented. Separate socio-demographic breakdowns are provided for potential hosts and potential occupants.

- The socio-demographic characteristics which were measured in this study include respondent-based demographics (age, sex, language, marital status), socio-economic variables (education, household income), community size and household composition measures. The latter were measured solely for potential hosts.

- The following discussion is based on the findings summarized in Exhibits 2.4 and 2.5. Exhibit 2.4 profiles the national market and provides breakdowns for potential occupants and hosts. Exhibit 2.5 presents socio-demographic profiles of the potential markets in the five regions of Canada – the Atlantic region, Quebec, Ontario, the Prairies and British Columbia. Due to smaller sample sizes, the regional breakdowns for occupants and hosts should be interpreted with caution.

Key Findings

- At a national level, including both occupants and hosts, the predominant characteristics of the potential market show them to be primarily married people (80%), anglophones (75%), women (59%), those with a high-school level education (48%), residents of rural communities (under 10,000 - 45%) and individuals at all levels of income.

EXHIBIT 2.5(a)

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL OCCUPANTS BY REGION

	Total (%)	Atlantic (%)	Quebec (%)	Ontario (%)	Prairies (%)	British Columbia (%)
Age						
60 - 64	38	45	37	39	32	28
65 - 69	30	23	26	31	33	36
70 - 74	17	13	15	17	18	19
75 - 79	9	9	9	8	14	6
80+	6	9	11	5	3	11
Sex						
Female	60	58	55	62	62	56
Male	40	42	45	38	38	44
First Language						
English	72	88	2	83	69	86
French	16	12	98	5	4	0
Other	12	0	0	12	27	14
Marital Status						
Single	1	2	0	2	0	0
Married	71	73	72	70	66	78
Divorced/widowed separated	28	27	28	28	33	22
Living as married	0	0	0	0	0	0
BASE (n=)	(602)	(113)	(65)	(258)	(130)	(36)

EXHIBIT 2.5(a)

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL OCCUPANTS BY REGION (Continued)

	Total (%)	Atlantic (%)	Quebec (%)	Ontario (%)	Prairies (%)	British Columbia (%)
Education						
Public School	23	26	37	17	26	17
Some High School	29	42	28	26	23	33
High School Grad	22	9	22	27	22	22
College	7	7	3	7	8	11
Some University	6	6	3	5	8	8
University Grad	11	8	3	14	10	8
Other	2	2	0	2	2	0
Household Income						
Under $20,000	31	40	52	20	32	42
$20,000 - $29,999	19	26	14	19	20	8
$30,000 - $39,999	10	4	11	14	8	11
$40,000 - $49,999	4	2	1	5	3	3
$50,000+	5	3	5	8	5	0
Retired	18	11	9	24	16	19
Not Stated	13	14	8	10	15	17
Community Size						
Under 10,000	45	65	55	34	50	31
10,000 - 99,999	20	27	23	18	13	22
100,000 - 499,999	12	8	6	16	11	17
500,000+	23	0	15	32	26	31
BASE (n=)	(602)	(113)	(65)	(258)	(130)	(36)

Gallup

EXHIBIT 2.5(b)

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL HOSTS BY REGION

	Total (%)	Atlantic (%)	Quebec (%)	Ontario (%)	Prairies (%)	British Columbia (%)
Age						
18 - 29	10	11	15	8	12	9
30 - 39	39	41	41	38	39	40
40 - 49	36	42	30	36	32	39
50 - 59	15	6	15	18	16	12
Sex						
Female	58	58	62	57	56	67
Male	42	42	38	43	44	33
First Language						
English	76	91	11	79	83	84
French	11	7	85	2	2	0
Other	13	0	4	19	15	16
Marital Status						
Single	6	3	10	5	7	12
Married	86	88	78	87	87	79
Divorced/widowed separated	6	8	7	6	5	9
Living as married	2	5	5	1	1	0
BASE (n=)	(881)	(160)	(81)	(376)	(207)	(57)

EXHIBIT 2.5(b)

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL HOSTS BY REGION (Continued)

	Total (%)	Atlantic (%)	Quebec (%)	Ontario (%)	Prairies (%)	British Columbia (%)
Education						
Public School	4	7	4	4	3	0
Some High School	17	22	26	19	14	9
High School Grad	27	24	26	23	33	33
College	17	12	21	20	13	21
Some University	8	6	5	8	10	14
University Grad	25	27	19	25	27	23
Other	1	1	0	1	0	0
Household Income						
Under $20,000	5	5	12	4	4	4
$20,000 - $29,999	15	28	22	10	13	5
$30,000 - $39,999	18	20	25	13	23	23
$40,000 - $49,999	18	14	11	19	21	21
$50,000+	35	25	21	44	32	28
Not Stated	9	8	9	10	10	19
Community Size						
Under 10,000	45	78	59	37	32	33
10,000 - 99,999	13	16	17	12	8	18
100,000 - 499,999	13	7	5	16	15	18
500,000+	29	0	19	35	44	32
BASE (n=)	(881)	(160)	(81)	(376)	(207)	(57)

Gallup

EXHIBIT 2.5(b)

SOCIO-DEMOGRAPHIC PROFILE OF POTENTIAL HOSTS BY REGION (Continued)

	Total (%)	Atlantic (%)	Quebec (%)	Ontario (%)	Prairies (%)	British Columbia (%)
Number of People In Household						
One	2	1	2	3	1	4
Two	19	18	12	20	22	21
Three	20	18	26	18	20	23
Four	37	41	32	34	41	39
Five or more	21	21	27	24	16	12
Children Under 10 in Household						
Yes	39	37	46	41	36	35
No	58	60	52	55	62	61
Children 10 - 17 in Household						
Yes	40	45	40	38	41	42
No	56	52	58	58	57	53
Any Children in Household						
Yes	67	71	69	65	65	67
No	30	26	28	31	33	28
BASE (n=)	(881)	(160)	(81)	(376)	(207)	(57)

- Among potential occupants, the predominant age group is between 60 - 69 (68%). Among potential hosts, the majority fall between the ages of 30 - 49 (73%), most have 3 - 4 people living in their household (57%) and are likely to have children living at home (67%).

- Potential occupants differ from hosts in that they are comparatively less likely to be married and more likely to be widowed, separated or divorced, and they tend to have much lower levels of education and income.

- While almost half of the market lies in rural communities (45%), it is important to note that a small majority of potential occupants and hosts reside in larger communities. That is, 15% live in communities of 10,000 - 100,000, 13% in areas of 100,000 - 500,000 residents, and 27% in large urban centres with populations of 500,000 or more.

- Regional markets of potential occupants and hosts did not differ significantly by age, sex, or marital status. Potential markets in Atlantic Canada and Quebec showed comparatively lower levels of education and income, however.

- Regional language differences are also apparent for both occupants and hosts. In Ontario and the Prairies, markets are characterized by a large majority of anglophones, a very small francophone component and a comparatively large third-language group. In Quebec, the market is strongly francophone with a small English component and a very small third-language group. The Maritimes have the largest relative anglophone market, a sizeable francophone group but a negligible third-language component. British Columbia shows a large anglogphone component, negligible francophone markets, and a sizeable third-language group.

- Among potential host families, those in Quebec are the least likely to have small households of only one or two members. Rather, they are the most likely to have families of three or more and to have children under the age of 10. Potential hosts in the Atlantic provinces also tend to have larger households and are the most likely to have children aged 10 -17. Those in the Prairies and British Columbia are the least likely to have larger households of five or more and the least likely to have young children in the household.

- Regional markets for host in Atlantic Canada and Quebec are largely rural whereas those in Ontario, the Prairies and British Columbia tend to be split between rural, mid-sized communities and large urban centres. The same pattern applies for occupants, except that approximately half of the Prairie market is rural, with the balance split between mid-size and large cities.

Implications

- Socio-demographic profiles of potential markets provide important insights for developing targetted promotional and marketing campaigns, both at the national and regional levels. Current findings suggest that there are enough commonalities across regions to allow for national marketing strategies. By the same token, given that there are some important differences across both regions for both potential occupants and hosts, more targetted efforts should serve to enhance marketing strategies.

EXHIBIT 2.6

DEMOGRAPHIC GROUPS MOST LIKELY/LEAST LIKELY TO BE AWARE OF GARDEN SUITES

HIGHEST AWARENESS	* Newfoundland (43%) * Saskatchewan (40%) * Ontario (39%) * community over 100 thousand (40%) * university educated (44%) * income $40,000 + (40%)
NATIONAL AVERAGE	34%
LOWEST AWARENESS	* Quebec (19%) * New Brunswick (22%) * age 18 - 29 (23%) * single (25%) * francophone (17%) * public school education (22%)

C. LEVEL OF AWARENESS

Key Findings

- Within the total potential market population for garden suites, approximately one third (34%) were aware of garden suites prior to being interviewed for the study.

- Awareness levels were virtually identical for both potential occupants (35%) and potential hosts (33%).

- However, a demographic breakdown of survey findings showed a number of important group differences in awareness. Groups showing the highest and lowest levels of awareness of garden suites are highlighted in Exhibit 2.6.

- As shown, residents of Newfoundland and Saskatchewan were more likely to be aware of garden suites than residents of other provinces. Urbanites, the university educated and higher income groups also showed relatively high levels of awareness. Those with relatively low levels of awareness included francophones, residents of Quebec and New Brunswick, young adults (18 - 29), singles and those with only a public school education.

- Awareness levels of respondents from the remaining provinces were as follows:

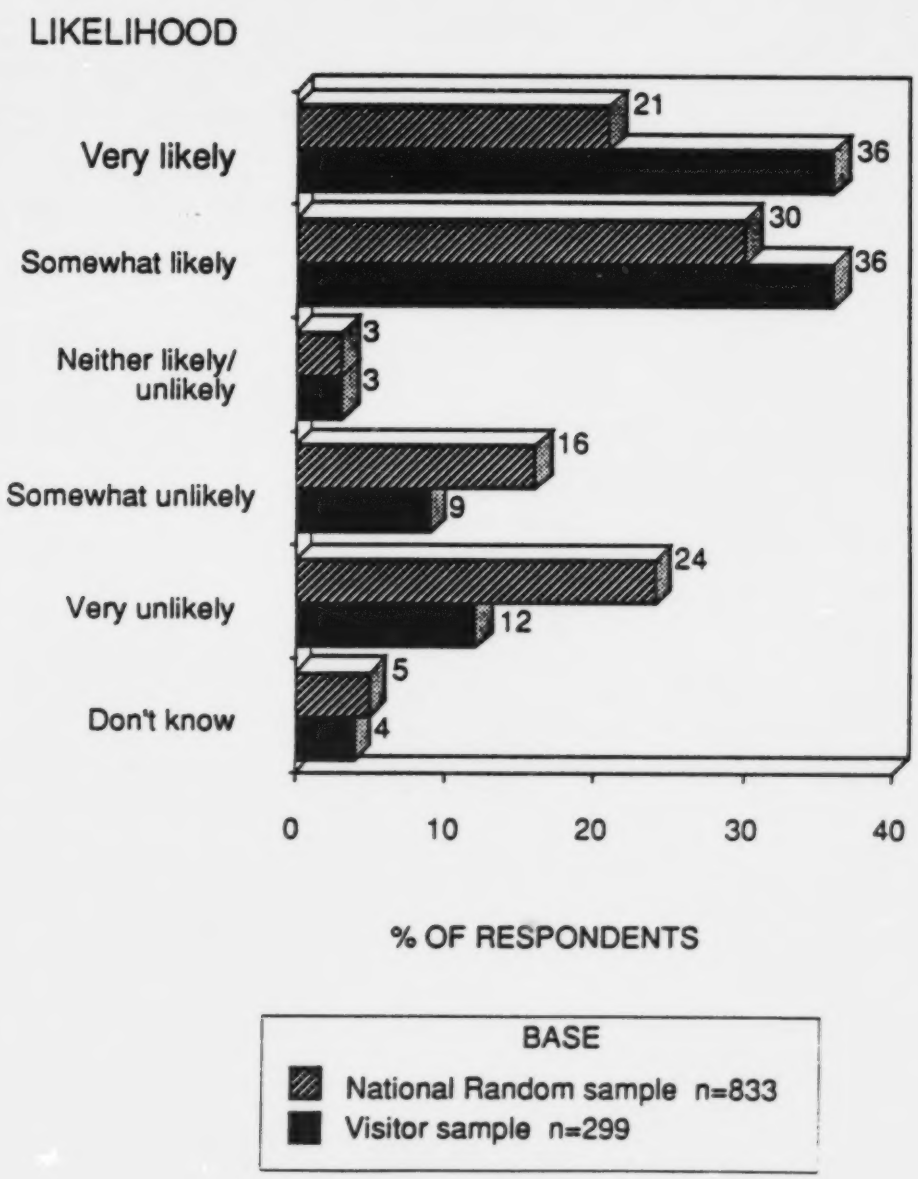
  - British Columbia (37%);
  - Alberta (32%);
  - Manitoba (31%);
  - Nova Scotia (29%); and
  - Prince Edward Island (36%).

- Awareness levels did not differ significantly by sex.

Implications

- Awareness - building will be an important consideration for marketing efforts in the future. While a substantial base currently exists, there is considerable room for expanding awareness, particularly among the francophone population and residents of Quebec and New Brunswick.

EXHIBIT 3.1
LIKELIHOOD OF PARENTS WANTING TO LIVE IN A GARDEN SUITE



III. LIKELIHOOD OF USE AND PREFERRED LOCATION

A. LIKELIHOOD OF PARENTS WANTING TO LIVE IN GARDEN SUITES

Key Findings

- Potential hosts were asked if their or their spouse's parents would want to live in a garden suite. The majority in both the national and visitor samples responded positively; as indicated by Exhibit 3.1, 51% of the potential hosts nationally and 72% of the potential hosts who visited a demonstration believed it was likely. This compares with 40% nationally and 21% of visitor hosts who believed it was unlikely that either set of parents would choose to live in a garden suite.

- Regional and provincial variation was noted. In terms of the most positive responses (very and somewhat likely), the pattern of variation was:

Region	Random (%)	Visitor (%)
British Columbia	68	69
Quebec	60	69
Atlantic provinces	51	74
Ontario	50	56
Prairie provinces	46	80

EXHIBIT 3.2

MAJOR REASONS GIVEN BY POTENTIAL HOST AS TO WHY PARENTS ARE UNLIKELY TO WANT TO LIVE IN GARDEN SUITES

Reason	Random (%)	Visitor (%)
Parents have own home/live in seniors apartment	34	21
Like independence	19	11
Parents live in another city or country	13	14
Parents need medical/nursing assistance	7	16
Like to live farther apart	7	11
Like where they are/like retirement plans	7	10
Prefer to live in-house with children	5	5
BASE (n=)	(352)	(63)

- In terms of the most negative responses (very and somewhat unlikely), the pattern of regional and provincial variation was:

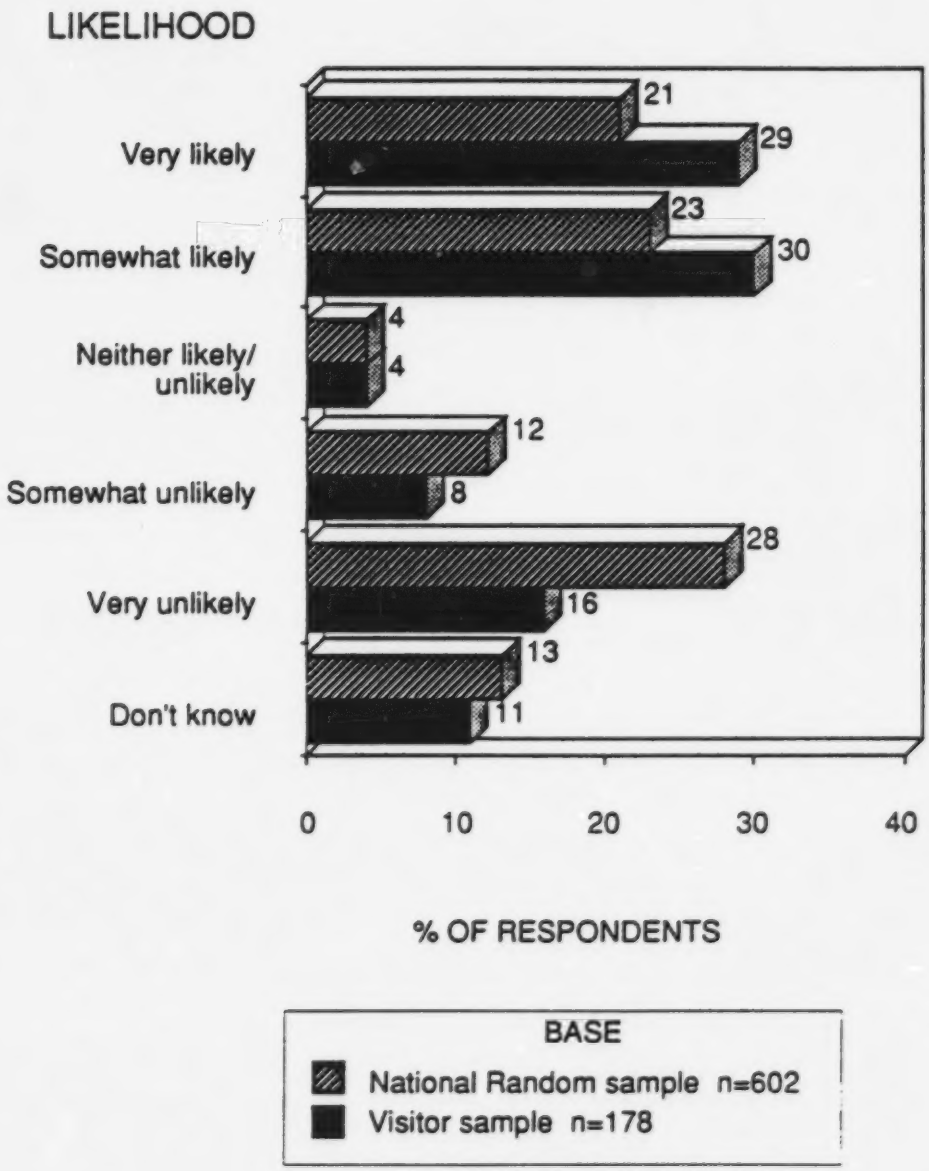
Region	Random (%)	Visitor (%)
Prairie provinces	46	27
Ontario	41	27
Atlantic provinces	36	5
Quebec	30	27
British Columbia	22	7

- In addition, there was significant variation on the basis of the likelihood of potential hosts having a garden suite installed on their property. Nationally, 82% of hosts who thought it likely they would install a garden suite believed it likely their parents would want to live in such a suite. Of visitor hosts, 91% who would likely install believed that their parents would likely live in a unit. Of those unlikely to install, 35% of national hosts and 50% of visitor hosts believed their parents likely to live in a unit.

- No significant variation was noted between urban and rural respondents.

- Exhibit 3.2 presents the reasons proffered by potential hosts as to why they perceived their parents were unlikely to want to live in a garden suite. The primary reason for both samples was the existence of current housing occupied by parents (34% nationally and 21% of visitors). Other reasons cited were the desire of parents to maintain their existing independence (19% nationally and 11% of visitors), the fact that parents lived in other cities or countries (13% nationally and 14% of visitors), the desire to live farther apart

EXHIBIT 3.3
LIKELIHOOD OF POTENTIAL HOSTS WANTING TO INSTALL A GARDEN SUITE ON THEIR PROPERTY



(7% nationally and 11% of visitors) and the need for medical/nursing assistance (7% nationally and 16% of visitors).

Implications

- A visit to a garden suite has a positive effect on personal impressions of the housing concept. This, in turn, has an impact on the belief that elderly Canadians are likely to accept the concept.

- There is a positive relationship between the belief of a potential host that a parent would want to live in a garden suite and the likelihood that they would be willing to install a unit on their property.

- Unlikelihood of wanting to live in a unit is based on circumstances owing to existing housing or the perceived loss of independence and not to any inherent weakness in the design of the concept.

B. LIKELIHOOD OF CHILDREN WANTING TO INSTALL A GARDEN SUITE

Key Findings

- Potential occupants were asked how likely it would be that their children would want to install a garden suite on their property. Exhibit 3.3 displays the results. Nationally, occupants were split -- 44% thought it likely and 40% thought it unlikely. Visitors were more positive -- 59% considered it likely while 24% considered it unlikely.

- Some regional and provincial variation was noted. In the visitor sample, British Columbians were most positive (77% thought it likely), followed by

EXHIBIT 3.4

MAJOR REASONS GIVEN BY POTENTIAL OCCUPANTS AS TO WHY THEIR CHILDREN WOULD BE UNLIKELY TO INSTALL GARDEN SUITES ON THEIR PROPERTY

Reason	Random (%)	Visitor (%)
Lot too small/crowds property	34	48
Like to live farther apart	15	7
Live in other city/country from children	5	14
Not interested/no need	7	2
Parents have own home/ live in seniors apartment	10	-
Lack of privacy	6	4
Like where parents are now/ like existing retirement plans	4	7
BASE (n=)	(237)	(44)

Quebec at 67%, Ontario and the Prairie provinces at 56% each and Atlantic Canada at 53%. In the national sample, a more minor variation was noted for positive responses – 47% of respondents from Ontario and British Columbia thought it likely followed by 43% from Atlantic Canada, 40% from the Prairie provinces and finally 37% from Quebec.

* In addition, those more impressed with the concept were more positive about the likelihood that their children would install a unit. Nationally, 55% of those who were impressed felt installation was likely versus 12% who were unimpressed. For visitors, 82% who were favourably impressed with the units thought it likely their children would wish to install a unit. Of those unimpressed with the concept 65% of the national sample and 57% of the visitor sample thought it unlikely that their children would install a unit.

* No significant variation was noted between urban and rural respondents.

* Finally, a relationship exists between the likelihood of an installation from the occupant's perspective and the perceived likelihood of neighbourhood acceptance. Nationally, 50% of those who feel an installation is likely also believe that neighbours' acceptance is likely; among visitors, 74% share such a view. However, 56% of those visitors who believe it unlikely that neighbours would accept the units still believe it likely that their children would install a suite. Only 28% nationally share this view, while 50% believe the reverse.

* Exhibit 3.4 highlights the reasons given by potential occupants as to why their children were unlikely to install a suite on their property. The preponderant reason dealt with property size; installing a unit would result in a crowded

EXHIBIT 3.5

PREFERRED LOCATION OF GARDEN SUITES

Location	Occupant		Host	
	Random (%)	Visitor (%)	Random (%)	Visitor (%)
Children's property/ parents occupy garden suite	45	67	55	62
Parent's property/ children occupy main house	29	18	20	12
Other property of friend or relative in neighbourhood	6	7	7	10
Other property of friend or relative not in neighbourhood	3	1	4	4
Other	5	3	1	3
Don't know/not stated	13	4	13	9
BASE (n=)	(602)	(178)	(883)	(299)

lot -- 34% of the national sample and 48% of visitors proffered this reasoning to explain the unlikelihood that their children would install a unit.

Implications

* Again, a visit to a garden suite appears to have a positive effect on impressions of this housing concept. Visitor occupants thought it more likely that a unit would be installed than the national sample.

* The more favourable the impression of the concept, the greater the belief in the likelihood that their children would want to install a unit.

C. PREFERRED LOCATION FOR GARDEN SUITES

Key Findings

* In the course of all interviews, respondents were asked about the preferred placement of garden suites. Potential occupants were asked where they would prefer to live; potential hosts were asked where they thought their parents or spouse's parents would prefer to live. Both questions asked respondents to assume that the potential occupants or the parents of potential hosts would live in a garden suite.

* Exhibit 3.5 highlights the strength of support for each option presented. The preferred option for each group was placement of a garden unit on the property of the occupant's child. Indeed, this was the majority option in all but one category -- national occupant -- where support registered at 45%.

- No significant variation was noted for provincial or regional data, nor was there any significant variation among rural and urban respondents.

- Potential occupants who preferred to live in a suite on the property of their children tended to reside within 50 miles or in the same province of one or more of their children:

	Random (%)	Visitor (%)
Within 50 miles	73	76
Same province	45	27

- Potential hosts who believed that their or their spouse's parents would prefer to live in a garden suite on their own property resided either within 50 miles of the potential occupant or in the same province.

	Random		Visitor	
	Parents (%)	Spouse's Parents (%)	Parents (%)	Spouse's Parents (%)
Within 50 miles	57	50	69	51
Same province	17	15	17	14

Implications

- The stated preference of potential occupants and the perception of occupant preferences by potential hosts are generally consistent with respect to the preferred location of garden suites.

EXHIBIT 3.6

THE LOCATION WHERE POTENTIAL OCCUPANTS ARE MORE LIKELY TO LIVE IN A GARDEN SUITE

Location	Random (%)	Visitor (%)
Property of children	36	51
One's own property	45	35
Just as likely on either	2	3
Would not live in a garden suite on either	10	6
Other	1	1
Don't know/not stated	6	4
BASE (n=)	(602)	(178)

- Existing property held by immediate family members is the preferred site for units and in the majority of cases such property is close at hand (within 50 miles or in the same province); the market potential seems clearly circumscribed with respect to location.

D. LIKELY LOCATION OF A GARDEN SUITE

Key Findings

- Having expressed a preference for the location of a garden suite, potential occupants were asked to consider their own personal situation, what they had learned about the concept and to indicate where they would be more likely to live in a garden suite -- on the property of their children or on their own property.

- The likelihood of each option is shown in Exhibit 3.6. While respondents were asked to indicate the likelihood of one or the other, if they volunteered neither, both or another option, those preferences were recorded. Nationally, respondents were more likely to reside in a garden unit on their own property (45%). Visitors occupants were more likely to reside on the property of their children (57%). A small percentage of both -- 2% nationally and 3% of visitors -- volunteered that either was just as likely; 10% nationally and 6% of visitors would not live in a garden suite.

- These stated preferences did not vary by province or region with the sole notable exception within the national sample for the Province of Quebec -- 17% were likely to reside on their own property and 40% volunteered that they would not live in a garden suite on either property.

EXHIBIT 3.7

PRINCIPAL REASONS FOR GREATER LIKELIHOOD OF RESIDING ON THE PROPERTY OF THEIR CHILDREN

Reason	Random (%)	Visitor (%)
Proximity to children	31	33
Don't have a large lot/children's lot larger	14	21
Mutual support	14	13
Live in apartment/condominium; don't own property	16	11
Must sell house to buy suite	5	6
That's the purpose - why move into your own backyard	8	9
BASE (n=)	(219)	(91)

- Male respondents were more likely than female respondents to live on their own property -- 51% versus 40% nationally and 45% versus 31% for the visitor sample.

- Respondents' perceptions of the likelihood that children would be willing to install a unit had an impact upon the choice of property. The more likely a unit would be installed on a child's property, the more likely it was that a parent would live in a garden suite on the property -- nationally, 51% versus 40% on their own property and for visitors, 61% versus 27%.

- The principal reasons for a respondent saying it was more likely that they would reside on the property of their children is shown in Exhibit 3.7. While proximity to the children was cited most often (31% nationally and 33% for the visitor category), the lack of suitable occupant-owned property is also a primary consideration. Combining the responses on property size and residing in an apartment or condominium produces a frequency of 30% for the national sample and 32% for the visitor sample.

- The principal reasons for a respondent saying it was more likely that they would reside on their own property are shown in Exhibit 3.8. The desire to maintain freedom and independence was cited most often (30% nationally and 40% for the visitor sample). Other reasons pertain to familiarity with and appreciation of the existing home, property and neighbourhood: familiarity (11% respectively for both samples); own a home already (9% nationally and 10% for visitor sample); prefer existing location (7% nationally and 3% for visitor sample); and proximity to friends (2% respectively for both samples).

EXHIBIT 3.8

PRINCIPAL REASONS FOR GREATER LIKELIHOOD OF RESIDING ON ONE'S OWN PROPERTY

Reason	Random (%)	Visitor (%)
Maintain freedom/independence	30	40
Wouldn't want to be a burden/ imposition	8	11
Own home/like ownership idea	9	10
Greater control this way	4	3
Prefer existing location	7	3
Children's lot smaller/they don't own property	16	13
Familiarity/security/comfort of own property	11	11
Want to be near friends	2	2
Don't want to live too close to children	5	8
BASE (n=)	(269)	(63)

Implications

- Some confusion may exist concerning this housing concept. Justifications presented for residing on one's own property, for example, pertain to maintenance of freedom, independence; not burdening children; like the idea of ownership and so on. Such attributes are ascribed to the existing property location and not the garden suite. It would seem that some respondents do not accept that the concept allows for independence, maintenance of privacy, ownership and so on.

E. PERCEIVED ACCEPTANCE BY NEIGHBOURS

Key Findings

- All participants in this market study were asked what they thought their neighbours' reactions would be if the participant were to install a garden suite on his or her property.

- Exhibit 3.9 sets out these perceptions. Both sample groups perceive that their neighbours will be more likely than unlikely to accept the installation of a garden suite -- 54% of the national sample think it likely versus only 24% unlikely; 66% of the visitor sample think it likely versus only 11% unlikely.

- Atlantic Canadians in both samples were stronger in their belief that neighbours were more likely to accept the installation of units -- in the national sample 68% expect neighbours will be likely versus only 13% who anticipate neighbours to be unlikely; in the visitor sample, 75% thought it was likely and only 5% thought it was unlikely.

EXHIBIT 3.9
LIKELIHOOD OF NEIGHBOURS ACCEPTING THE INSTALLATION OF A GARDEN SUITE ON THE PROPERTY OF THE RESPONDENT

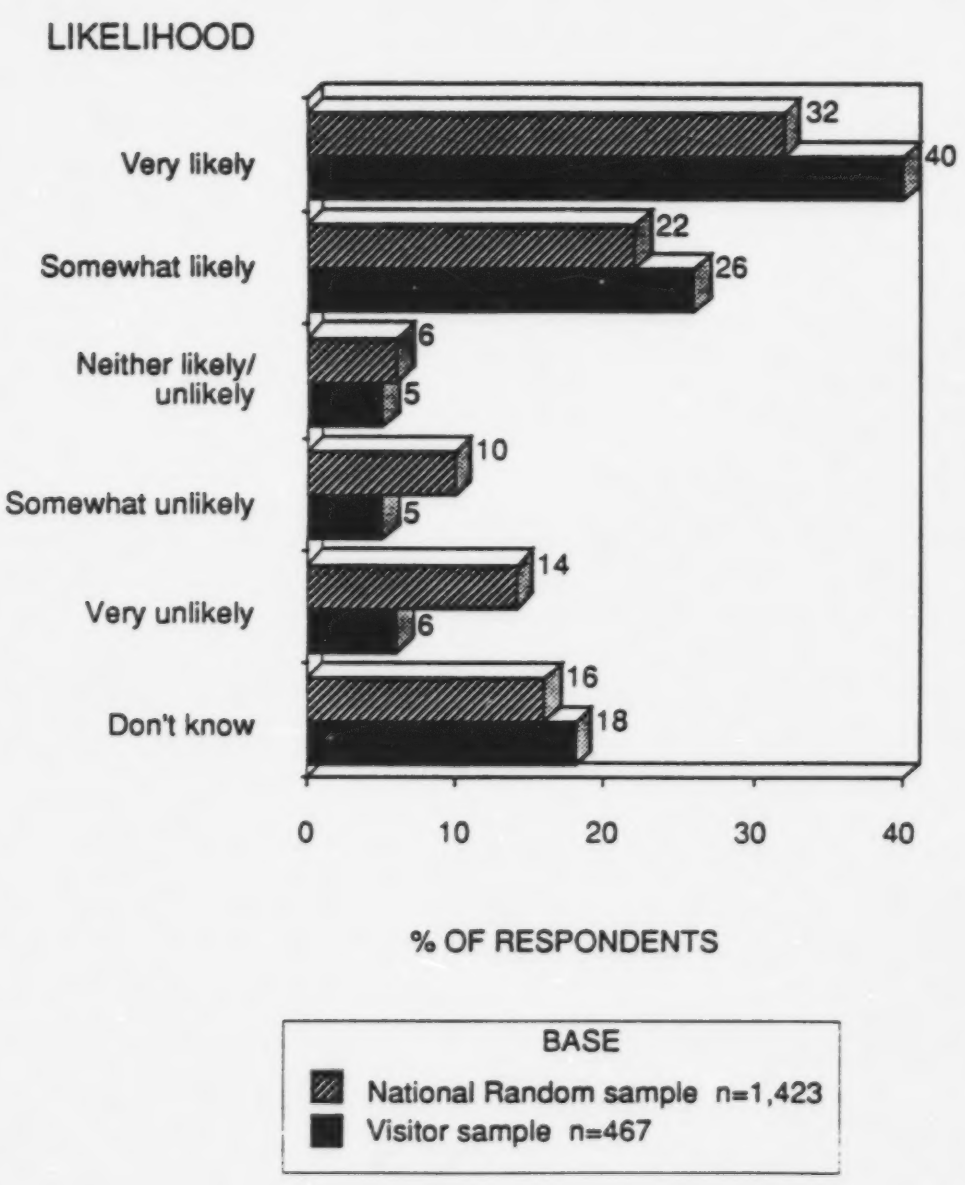


EXHIBIT 3.10

PRIMARY REASONS FOR SAYING THAT NEIGHBOURS WOULD LIKELY ACCEPT THE GARDEN SUITE

Reasons	Random (%)	Visitor (%)
Large enough lots/enough space	24	34
Nice neighbours/friends	20	25
Family oriented/elderly neighbourhood	8	12
Know neighbours/wouldn't mind	12	20
Neighbours wouldn't notice	3	6
Units look nice	3	8
Good purchase	4	5
Neighbours already have other buildings on their property	1	2
Other positive comments	2	1
Don't care what neighbours think	3	2
Don't know/not stated	2	2
BASE (n=)	(1,043)	(311)

EXHIBIT 3.11

PRIMARY REASONS FOR SAYING THAT NEIGHBOURS WOULD BE UNLIKELY TO ACCEPT THE GARDEN SUITE

Reasons	Random (%)	Visitor (%)
Lack of space/crowded	29	31
Problem with neighbours/might object	24	13
Legal problems	10	19
Blocked view	7	13
Concern over downgrading value of property	12	8
Lack of privacy	4	2
Don't want Granny Suite in the backyard	5	2
Would not fit in with the neighbourhood	3	4
Destroys look of the neighbourhood	1	4
Other negative comments	6	2
Don't know/not stated	3	2
BASE (n=)	(339)	(52)

- No significant variation from the national findings was noted between rural and urban respondents.

- When respondents were asked to indicate the reasons why they believed neighbours would likely accept the installation of garden suites, results in Exhibit 3.10 show that both groups believe that the size of their lots could adequately accommodate the units without disruption to the neighbourhood (34% for national; 24% for visitors sample).

- If the next three reasons are grouped together, given that they all refer to the character of the neighbourhood -- its neighbourliness -- then this category becomes the dominant reason for believing in the likelihood of acceptance.

	Random (%)	Visitor (%)
Nice neighbours/friends		
Family oriented/ elderly neighbourhood	40	57
Know neighbours/ wouldn't mind		

- Very few respondents referred to the design or physical appearance as justification for their perceptions -- only 3% of the national sample and 8% of the visitor sample made mention of these characteristics.

- Reasons for believing it was <u>unlikely</u> that neighbours would find an installation acceptable are shown in Exhibit 3.11. Principal among them, and in direct contrast with the principal reason cited for believing neighbours

were likely to accept placement of unit, is concern with the adequacy of lot size (29% of the national sample and 31% of the visitor sample).

- A general concern that neighbours might object (24% national, 13% visitor); potential legal problems (10% national, 19% visitor); the negative impact on property values (12% national, 8% visitor); and potentially blocking the views of neighbours (7% national, 13% visitor) were the next four most often mentioned reasons.

- Of the few respondents who believed that neighbours would remain neutral on the acceptance or rejection of garden suites in the neighbourhood, no primary or principle reason emerged for this response.

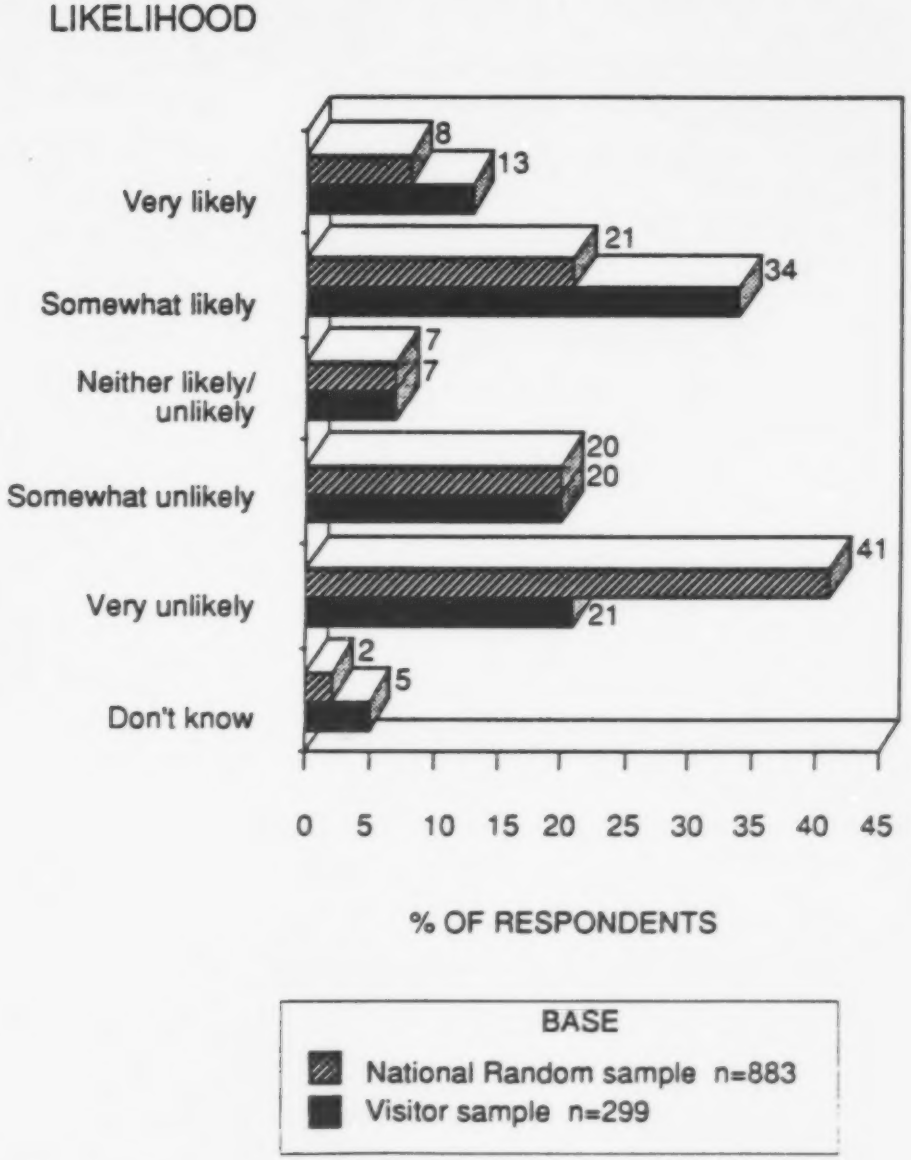
- No significant variation in the ordering of reasons for the likelihood of acceptance or rejection was noted for the provinces, regions and urban or rural communities.

- Respondents who were favourably impressed with the garden suite concept perceived their neighbours to be more likely to accept the installation of a unit in the neighbourhood. Those unimpressed with the unit perceived their neighbours to be unlikely to accept the installation. To some extent the reasons cited to justify the perceptions of the neighbours' acceptance or rejection may be formed by the reasoning behind the respondents' impressions of garden suites.

Implications

- Acceptance is based more on intangibles -- the quality of the neighbourhood, neighbourliness, existing friendships. Rejection is based more on legal,

EXHIBIT 3.12
LIKELIHOOD OF INSTALLING A GARDEN SUITE ON THEIR PROPERTY



economic, and development issues. Very little of the reasoning is addressed to the specifics of design, the outside appearance or the absolute rejection of the concept.

F. LIKELIHOOD OF INSTALLING A GARDEN SUITE

Key Findings

- Potential hosts were asked to consider their family situation, what they had learned about the garden suite concept and to respond to how likely they would be to have a garden suite installed on their property. Exhibit 3.12 presents the responses of potential hosts for both sample groups.

- The majority (61%) of national sample hosts are unlikely to install a unit. Only 29% stated they would be likely to install a unit. This magnitude is even more dramatic when the degree of likelihood is observed – 41% of hosts are very unlikely to install as contrasted with only 8% who are very likely to erect a garden suite on their property.

- Potential hosts who visited a garden suite demonstration site are more likely to install than not (47% versus 41%). When the degree of likelihood is examined, this positive result is somewhat qualified. Only 8% are very likely to install, contrasted with 21% who are very unlikely to locate a unit on their property.

- No significant variation was noted for the regions, the provinces or for rural and urban communities.

EXHIBIT 3.13

PRINCIPAL REASONS WHY IT IS UNLIKELY THAT A GARDEN UNIT WOULD BE INSTALLED ON A RESPONDENT'S (POTENTIAL HOST) PROPERTY

Reasons	Random (%)	Visitor (%)
Backyard/lot too small	24	23
Cost/can't afford one	11	12
Parents have own home	12	11
Loss of independence	7	4
Parents don't want to move	5	7
Don't want to live close by parents	6	0
Parents would or already live with other family member	2	3
Parents live in other city/province/ country	9	9
Parents require medical attention	4	7
Zoning/legal problems	3	12
Parents are young or in good health	3	4
Parents are too old	1	7
Doesn't suit parents	5	2
No need	7	4
BASE (n=)	(543)	(122)

- Some variation exists based upon the likelihood of parents' willingness to reside in a garden suite. For this sub-group within the national sample, 47% are likely to install; 41% are unlikely to install and only 16% very unlikely. For this sub-group within the visitor sample, majority (61%) are likely to install and 29% are unlikely to install.

- The reasons for saying that it would be unlikely to have a garden suite installed are listed in Exhibit 3.13. For both samples the three primary reasons cited are:

	Random (%)	Visitor (%)
Lot too small	24%	23%
Cost	11%	12%
Parents already own a home	12%	11%

- Zoning and legal problems are cited by 3% of the national sample and 12% of the visitor sample. Other reasons enumerated have very little to do with the design of the suite, with zoning by-laws, with ownership issues or the like. In large measure, they are more sociological or cultural.

- This ranking of reasons holds for the provinces, regions and rural and urban areas.

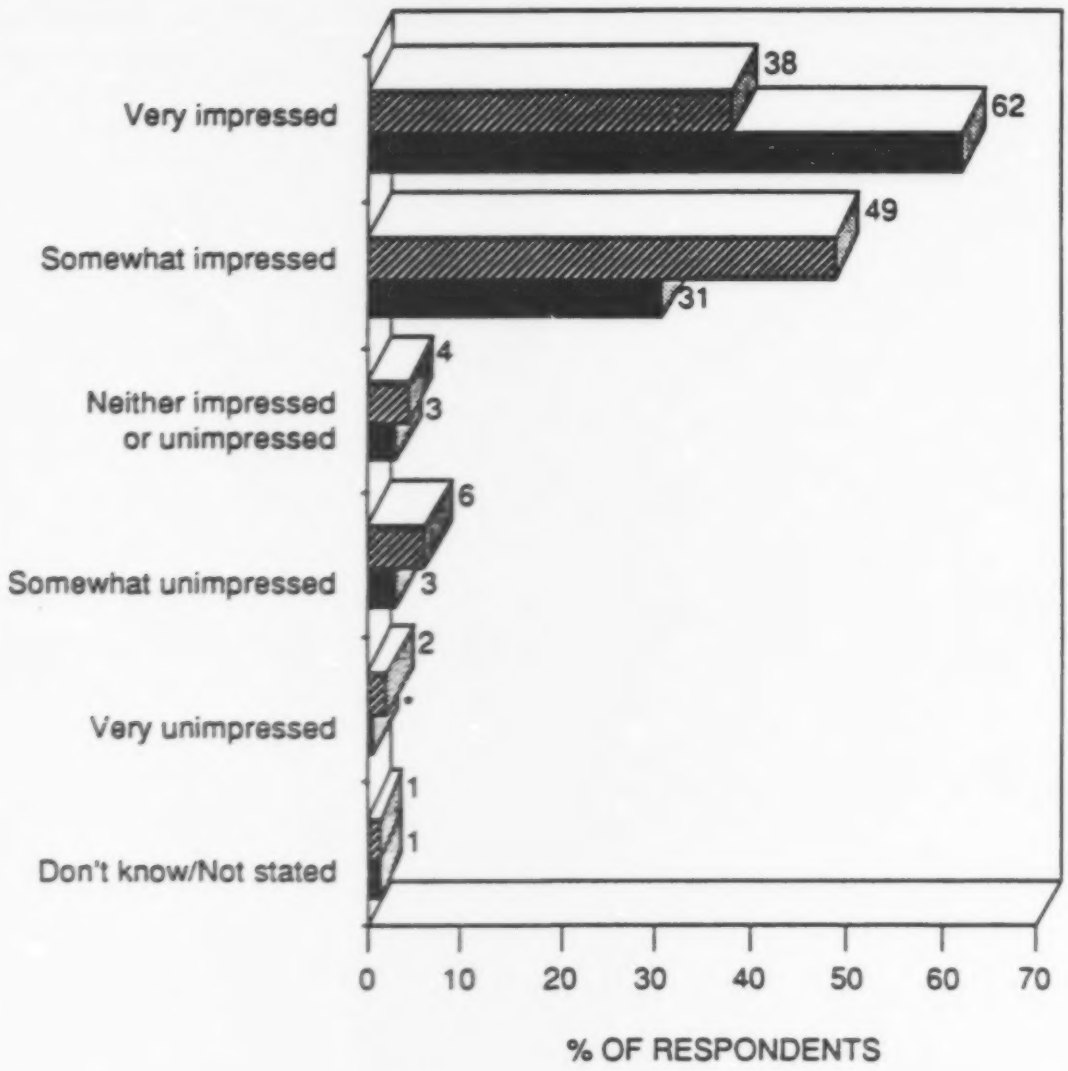
Implications

- Marketing the concept and convincing potential hosts to install a unit are very difficult undertakings. It would seem that the general population is not predisposed to the notion but a visit to a demonstration site ameliorates the situation somewhat.

- Reasons for such a pre-disposition focus on non-design, non-legal, non-development issues. It is true that lot size, cost and zoning account for more than a third of the citations. The balance and majority of reasons, however, are less tangible, less susceptible to a clear-cut market solution. Any successful marketing strategy should take account of this observation.

- These findings also suggest that only a minority (29%) of the total potential host market, as measured in Chapter II, currently represents a likely market for garden suites. At a national level, strong potential hosts are more likely to number 772,000 than 2.66 million. Those who are very likely to install a garden suite on their property number closer to 213,000. Communications will be crucial to increasing these numbers and taking advantage of the much larger potential market.

EXHIBIT 4.1
GENERAL IMPRESSION OF GARDEN SUITES



*indicates less than 1%

IV. REACTION TO GARDEN SUITE DESIGNS

A. GENERAL IMPRESSIONS OF GARDEN SUITES

Key Findings

- All respondents were asked to give their general impression of garden suites. For those who had visited a garden suite demonstration, impressions were obtained based on this visit, prior to receiving additional information in the mail. For the randomly chosen national sample, impressions were sought from those who reported having received and read through the information package on garden suites sent to them by mail. This package included a CMHC brochure entitled "Garden Suites - A new housing option for elderly Canadians?" as well as pictures and floor plans for three distinct models (see Appendix II).

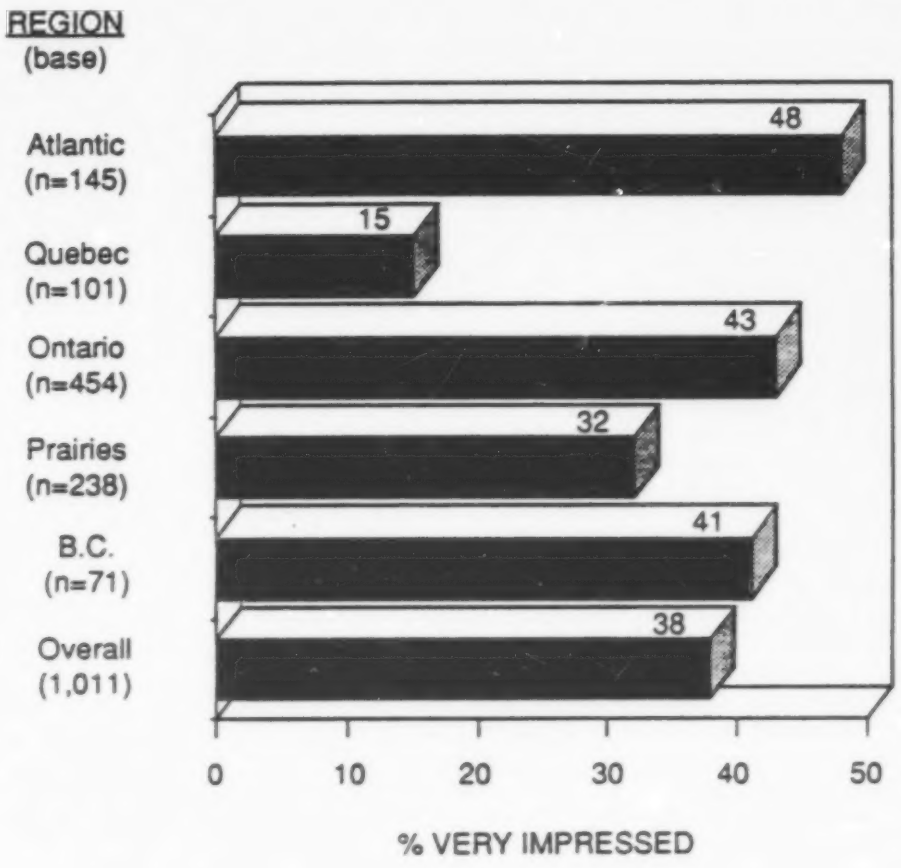
- Results for each group are presented in Exhibit 4.1. Overall, a strong majority of both groups were favourably impressed with the garden suites to some degree. Within the national market, in general, 87% were impressed with the suites and among demonstration visitors, 93% were impressed.

- Clearly, visitors to demonstration sites were much more impressed than those who had just received written material and designs in the mail. Specifically, 62% of visitors reported being very impressed with garden suites compared to 38% for non-visitors.

- Based on the national sample results, residents of the Atlantic region were the most likely to be very impressed with the garden suites (48%), followed by Ontario (43%) and British Columbia (41%). Residents of Quebec were

Gallup

EXHIBIT 4.2
GENERAL IMPRESSION OF GARDEN SUITES BY REGION



Source: National Random Survey

the least impressed (15%) with the Prairies falling in between (32%). These results are presented in Exhibit 4.2.

- Francophones (23%) and single respondents (28%) were also among the least likely to be very impressed with garden suites.

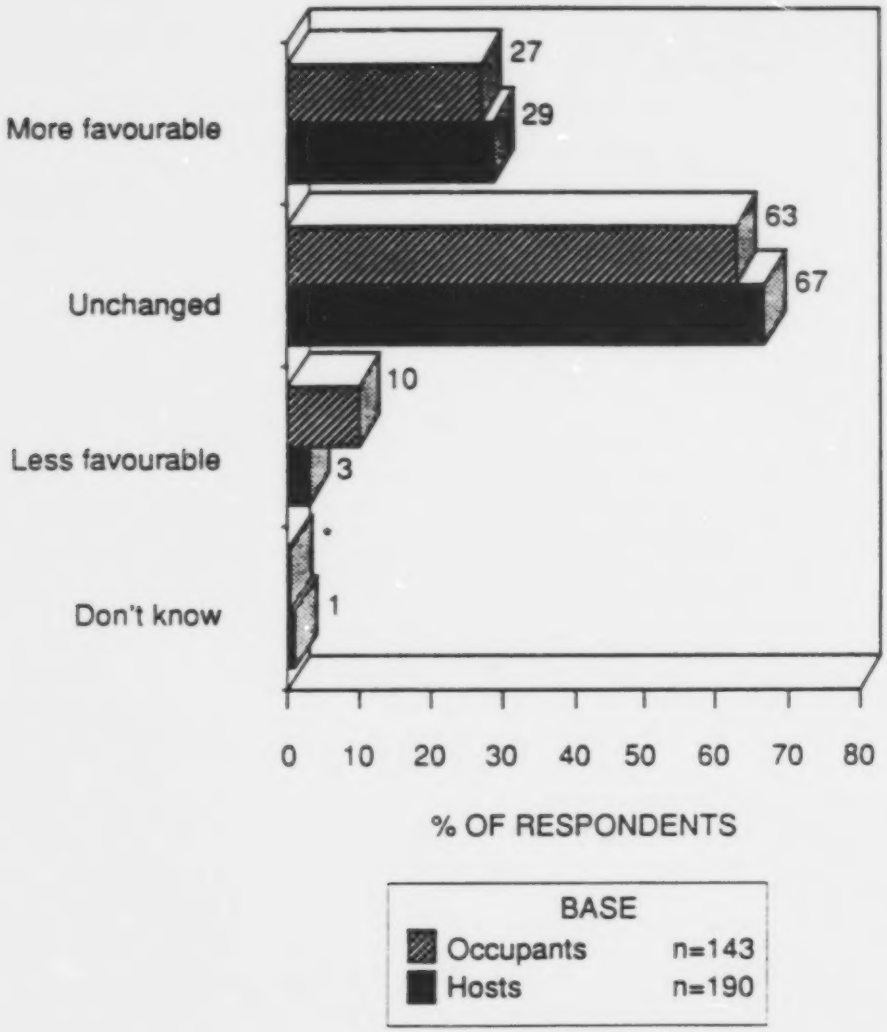
- No meaningful differences were found among potential occupants and hosts, men and women, age groups, education and income groups or residents of urban and rural communities.

- Among those who had visited a demonstration site, respondents were also asked to report whether or not their impressions of garden suites had changed as a result of receiving further information in the mail. For those who had received and read through this information, the majority (65%) reported that their impressions had remained the same. A substantial minority (28%) held more favourable opinions as a result, with 6% expressing a less favourable view.

- Results for both potential occupants and potential hosts who had visited a garden suite demonstration and received further information are presented in Exhibit 4.3. As shown, these groups expressed virtually identical views.

- Respondents were also probed for the reasons why their impressions had changed or stayed the same. Exhibit 4.4 lists these responses for each group. (It is important to note that the sample sizes for these sub-questions are relatively small. Therefore, these results should be interpreted in a qualitative fashion, providing only a general flavour for the issues arising from the printed materials.)

EXHIBIT 4.3
CHANGE IN VISITOR IMPRESSIONS OF GARDEN SUITES UPON RECEIVING ADDITIONAL INFORMATION



*Indicates less than 1%.

Source: Visitor survey.

EXHIBIT 4.4

REASONS FOR CHANGE OR LACK OF CHANGE IN IMPRESSIONS OF GARDEN SUITES

Reasons For More Favourable Impression	Visitors		
	Occupants (%)	Hosts (%)	Total (%)
More information provided	24	31	28
Good idea/concept	18	16	17
Closer to family/children	21	15	17
Will suit elderly people	0	9	5
Good for elderly who want to be independent	8	4	5
Necessary for elderly/ something for seniors	5	6	5
Like layout/could study layout	8	7	7
Liked the design	5	7	6
Variety of models to choose from	0	7	4
Easy to assemble/put up	3	6	4
Qualified answer	8	7	7
Other	21	9	14
BASE (n=)	(38)	(55)	(93)

EXHIBIT 4.4

REASONS FOR CHANGE OR LACK OF CHANGE IN IMPRESSIONS OF GARDEN SUITES (Continued)

Reasons For No Change in Impression	Visitors		
	Occupants (%)	Hosts (%)	Total (%)
Always felt favourably	76	69	72
Saw information previously/ same information/concept the same	6	14	11
Same information as garden display	4	9	7
Need more information	8	2	5
Other	11	9	10
Don't know	2	2	2
BASE (n=)	(90)	(127)	(217)
Reasons for Less Favourable Impression			
Lack of space/need big lot	29	50	35
Cost reasons	29	33	30
Problems with foundation	0	33	10
Installation problems	14	0	10
Suite too small	7	0	5
Other	50	83	60
BASE (n=)	(14)	(6)	(20)

- According to respondents, the information provided created a more favourable impression for three general reasons. First, it simply provided them with more information with which to evaluate garden suites. Secondly, it created or reinforced the view that "granny flats" are a good idea or concept, which allows families to be closer together, allows seniors to be independent and is generally necessary for the elderly. Thirdly, elements of design seemed to play a role also with several comments on the layout, design, models and assembly.

- Less favourable impressions were based on issues related to the amount of space required on host properties, cost factors, and concerns about foundations and installations.

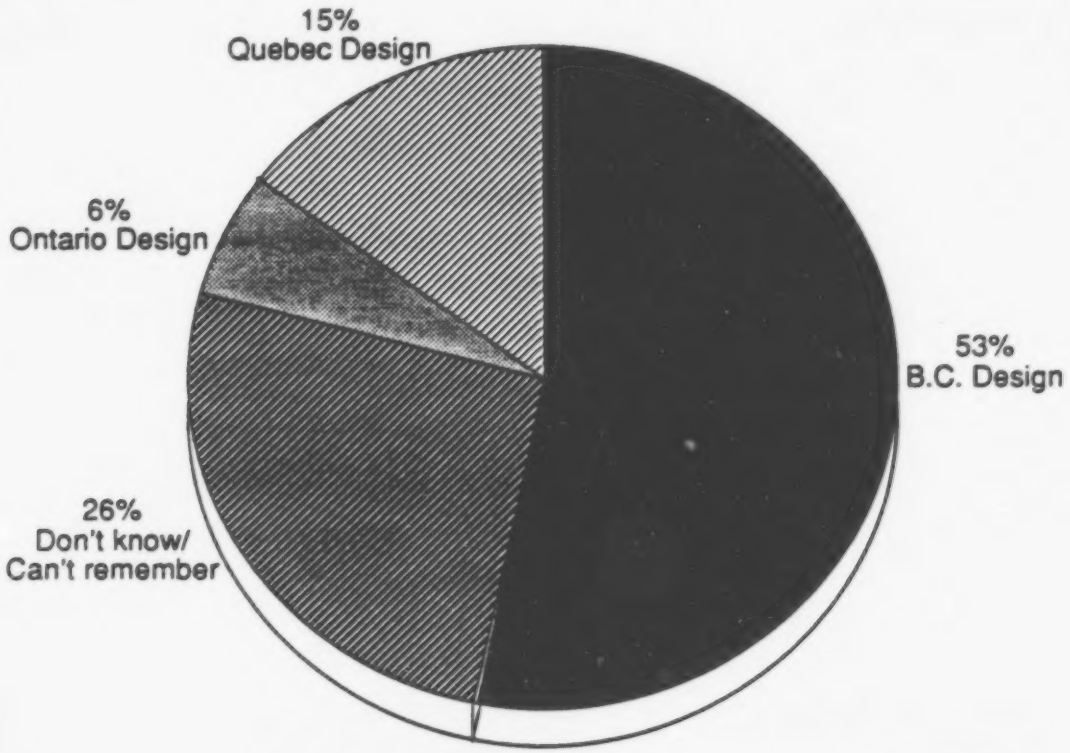
- For the many respondents whose impressions remained the same, the majority expressed that their views were already favourable. For others, the package simply did not provide them with any new information.

Implications

- Overall, there is a positive reaction to the concept of garden suites for elderly Canadians.

- While the more favourable impression of demonstration visitors may reflect a self-selection bias -- i.e., those who went to see a demonstration are likely to be those who were initially the most interested in the concept -- the demonstrations seem nevertheless to have a positive impact. That is, visitors remain overwhelmingly positive suggesting that they were impressed with what they saw.

EXHIBIT 4.5
PREFERRED GARDEN SUITE DESIGN
FROM INFORMATION PACKAGE



BASE
(n=) 876

Source: National Random Survey.

- It is important that both potential hosts and occupants were equally impressed with garden suites, given that decisions concerning their use are likely to be of a joint nature.

- Marketing may require targetted efforts toward francophones and residents of Quebec in general, who tend to be the least impressed with garden suites. As previously reported, these groups also tended to have the lowest initial level of awareness of garden suites.

- While results are generally positive, the random survey suggests that the idea is not completely sold. Factors which would increase acceptance of garden suites will be discussed in more detail later in this report. A first gleaning of such factors suggests that some of the main concerns are with issues of property size or available space, costs and installation. Positive factors seem to include the concept itself with related benefits of having family close by while maintaining independence, as well as the actual designs and layouts currently put forward.

B. DESIGN PREFERENCES

Key Findings

- Three distinct designs were provided to respondents. For each, a picture of the exterior and a floor plan of the model were included for their review (see Appendix II for the information package).

- Exhibit 4.5 summarizes the design preferences reported by respondents in the national random survey. Clearly, there is a strong preference for the British Columbia model (53% of respondents). Only 21% preferred one of the other

EXHIBIT 4.6

PREFERRED GARDEN SUITE DESIGN BY REGION

	Total (%)	Atlantic (%)	Quebec (%)	Ontario (%)	Prairies (%)	British Columbia (%)
Design #1 (British Columbia)	53	60	30	53	52	67
Design #2 (Quebec)	15	13	31	14	14	2
Design #3 (Ontario)	6	5	7	6	7	4
Don't Know/ Can't Remember	26	22	31	27	27	27
BASE (n=)	(876)	(129)	(83)	(404)	(204)	(55)

Source: National Random Survey

two models with a somewhat higher degree of preference for the Quebec model (15%) over the Ontario model (6%). Approximately one-quarter of respondents said that they did not know or could not remember at the time of the survey.

- These findings are confirmed by respondents' reports of their least preferred design. Ontario was the least liked model among 66% of respondents, followed by Quebec (13%) and British Columbia (7%), with 14% not able to provide a response.

- Potential occupants and hosts did not show any meaningful differences in design preference. Similarly, preferences did not vary across most demographic groups.

- However, some regional, language and age differences were found in design preferences. A regional breakdown is provided in Exhibit 4.6. As shown, residents of British Columbia are more likely than average to prefer the British Columbia model and less likely than other provinces to prefer the Quebec model. Conversely, Quebec residents were less likely to prefer the British Columbia model and more likely to prefer the Quebec model.

- Similarly, francophones in general showed a higher than average degree of preference for the Quebec model (29%) and a lower preference for the British Columbia model (35%) compared to the national sample as a whole.

- A breakdown by age also showed that potential occupants aged 70 - 74 were the most likely to prefer the British Columbia model (63%) and those aged 75 or older were the least likely (36%). The latter were the most likely to prefer the Quebec design (20%).

EXHIBIT 4.7

GARDEN SUITE DESIGN PREFERRED BY DEMONSTRATION VISITORS

Preferred Design	% of Visitors
Garden Suite Visited	
Newfoundland	1
Prince Edward Island	0
Nova Scotia	*
New Brunswick	2
Quebec	
- unspecified	2
- rectangular	1
- square	0
Ontario	1
Manitoba	3
Saskatchewan	3
Alberta	9
British Columbia	5
Total	27
Garden Suite Described in Information Package	
Unspecified	8
British Columbia Design	31
Quebec Design	10
Ontario Design	3
Total	52
No Preference	9
None	1
Don't Know	11
BASE (n=)	(333)

* indicates less than 1%

- Design preferences among those who had visited a demonstration suite are summarized in Exhibit 4.7. Overall, 27% preferred the garden suite model they had visited, 52% preferred one of the models described in the information package, 9% had no preference, 1% did not like any of them, and 11% were unable to provide an answer.

- Among those who preferred a demonstration model, the Alberta model was chosen most often (9%), followed by British Columbia (5%). As was the case for the national random sample, visitors who preferred a design from the information package tended to be most impressed with the British Columbia design (31%). The Quebec design placed a distant second (10%) and the Ontario design was least likely to be preferred (3%).

- Respondents were also asked to give reasons for their preferences. Comments were generally related to the overall shape and size of the garden suite, its appearance or style, the layout or floor plan and specific features such as the porch or windows.

- Exhibit 4.8 summarizes the reasons provided by the visitor group overall and by the largest categories of specific design preference. Due to the relatively small sample sizes of sub-groups, detailed breakdowns by design preference are not provided.

- As shown, those who preferred the British Columbia design typically based their choice on its appearance. Many respondents stated that it looked more like a home and particularly liked the porch. This model received relatively lower scores for its size and suitability to their property.

EXHIBIT 4.8

REASONS[1] FOR GARDEN SUITE PREFERENCE OF VISITORS

Liked ...	Total (%)	Design Preference: British Columbia (%)	Alberta (%)	Quebec (%)	Ontario (%)
Overall shape and size	18	12	30	18	27
- bigger	10				
- compact	3				
- liked shape	2				
- suitable for lot	4				
Appearance	25	37	12	28	13
- exterior	4				
- design	5				
- style	1				
- looks better	6				
- looks more like a home	9				
Layout	22	21	26	30	33
- of rooms	7				
- of facilities	2				
- unspecified	14				
Specific Features	11	19	5	12	7
- porch	8	14	2	2	7
- windows	2	3	2	0	0
- storage	2	1	0	10	0
Other	22	10	26	12	20
- practical/functional	1				
- well thought out	1				
- other	20				
Don't know	1	0	2	0	0
BASE (n=)	(291)	(120)	(29)	(32)	(13)

[1] As multiple answers were accepted, percentages are based on total responses.

- Those who preferred the Alberta demonstration model did so primarily for its overall shape and size and because they liked its layout or floor plan. Its general appearance was not seen as an attraction. Similar results were found for the Ontario model.

- A preference for the Quebec model was most strongly related to a preference for its layout/floor plan, with special reference to its storage space, and its general appearance. Less weight was given to its overall shape and size.

Implications

- The British Columbia design is the most attractive to all respondents, due primarily to its exterior appearance and overall looks. The strengths of other models lie in their overall shape and size or the layout of the rooms and facilities.

- Exterior appearance is obviously a salient issue to potential garden suite users. Given an attractive exterior, however, other design issues should take on increasing importance.

C. RATING OF GARDEN SUITE CHARACTERISTICS

Key Findings

- All respondents were asked to rate various garden suite characteristics on a scale from 1 to 10, where 1 meant "very poor", 5 meant "neither positive nor negative" and 10 meant "very good".

EXHIBIT 4.9

MEAN RATING OF GARDEN SUITE CHARACTERISTICS

	Random Sample	Visitor Sample
Design (e.g., exterior appearance)	7.5	7.8
Facilities (e.g., kitchen, bathroom)	7.8	8.2
Available Space (e.g., roominess in living room, bedroom)	7.4	7.8
Comfort	7.8	8.2
Individual Privacy	8.0	8.5
BASE (n=)	(1,011)	(333)

SCALE

1	2	3	4	5	6	7	8	9	10
Very Poor				Neither Positive nor Negative					Very Good

- Exhibit 4.9 presents the findings for the five specific characteristics assessed, both for the national random sample of respondents and for the demonstration visitor group.

- Overall, results were very positive with average scores ranging from 7.4 to 8.5 out of 10. The highest ratings were generated for the privacy of garden suites, followed by perceived comfort and facilities such as kitchen and bathroom facilities. Lower ratings were given to available space inside the suite and elements of design such as the exterior appearance.

- Demonstration visitors gave more positive ratings than non-visitors on all characteristics. Within this visitor group, potential hosts were generally more impressed than potential occupants, particularly with regard to privacy (8.7 vs. 8.2), perceived comfort (8.3 vs. 8.0) and available space (7.9 vs. 7.6).

- Within the general population, potential occupants tended to be more impressed with the design/appearance of the garden suite than potential hosts (7.7 vs. 7.4).

- Respondents' overall ratings on these design characteristics were compared to their specific model preferences. While respondents did not evaluate each model's individual characteristics, this comparison may provide insights into the reasons for their selection.

- Exhibit 4.10 presents average scores for each characteristic for respondents in the national random survey who indicated a preference for either the Ontario, Quebec or British Columbia model. As shown, a preference for the British Columbia model is associated with higher ratings on exterior appearance or design and comparatively lower ratings on privacy. Preference

EXHIBIT 4.10

MEAN RATING OF GARDEN SUITE CHARACTERISTICS BY DESIGN PREFERENCE

Features	Ontario	Quebec	British Columbia
Design (e.g., exterior appearance)	7.2	7.6	7.8
Facilities	7.7	8.2	8.0
Available space	7.6	7.8	7.4
Comfort	7.8	8.0	7.9
Privacy	8.5	8.5	8.1
BASE (n=)	(55)	(128)	(461)

Source: National Random Survey

EXHIBIT 4.11

DISLIKES ABOUT GARDEN SUITE CONCEPT

	Random Sample (%)	Visitor Sample (%)
Nothing/None	44	52
Design & Facilities		
* Suite too small	4	6
* Dislike design of steps	1	1
* Dislike look of exterior	2	2
* Only one entrance/exit	1	2
* No porch	*	*
* Poorly situated bathrooms	1	1
* No storage space	1	1
* Other specific design problems	8	12
* Design is poor (unspecific)	1	2
Lot Size/Available Space		
* Lot is too small	13	6
* Concerns about what happens after to empty lot	1	2
* Suite too large	*	0
Neighbourhood/Zoning		
* Affects appearance of neighbourhood	2	1
* Neighbours wouldn't like it	2	*
* Zoning/legal problems	2	4
* Crowded/congested neighbourhood	*	0
* Concerned about devaluing property	1	1

EXHIBIT 4.11

DISLIKES ABOUT GARDEN SUITE CONCEPT (Continued)

	Random Sample (%)	Visitor Sample (%)
Privacy/Independence/Shared Space		
* Loss of privacy	2	*
* Wouldn't work for us	1	0
* Dislike being located on own lot/children wouldn't like it located on their lot	3	1
* Don't want to live too close to children	2	1
* Loss of independence	1	*
* Dislike moving distances	*	0
* Concerned about adapting	1	1
* Isolated/don't want to be alone	1	0
* Prefer to be among older people/ friends own age	*	1
Other		
* Cost	3	4
* More flexible eligibility requirements	*	1
* Need more information	4	4
* Qualified comment	2	2
* General negative	2	1
* Other	4	3
Don't know/not stated	1	1
BASE (n=)	(1,011)	(333)

* Indicates less than 1%

for the Quebec model is associated with comparatively higher scores for its facilities, available space and perceived comfort. Both Ontario and Quebec designs were linked to greater perceived privacy. The Ontario design was most closely associated with lower scores on exterior appearance.

* All respondents were also asked if there was anything in particular that they disliked about the garden suite concept. In the general market population, 55% of respondents mentioned a particular concern, with 44% saying there was nothing they disliked and 1% being unsure. Visitors were somewhat more positive, with 47% reporting a particular concern, 52% saying they had no dislikes and 1% being unsure.

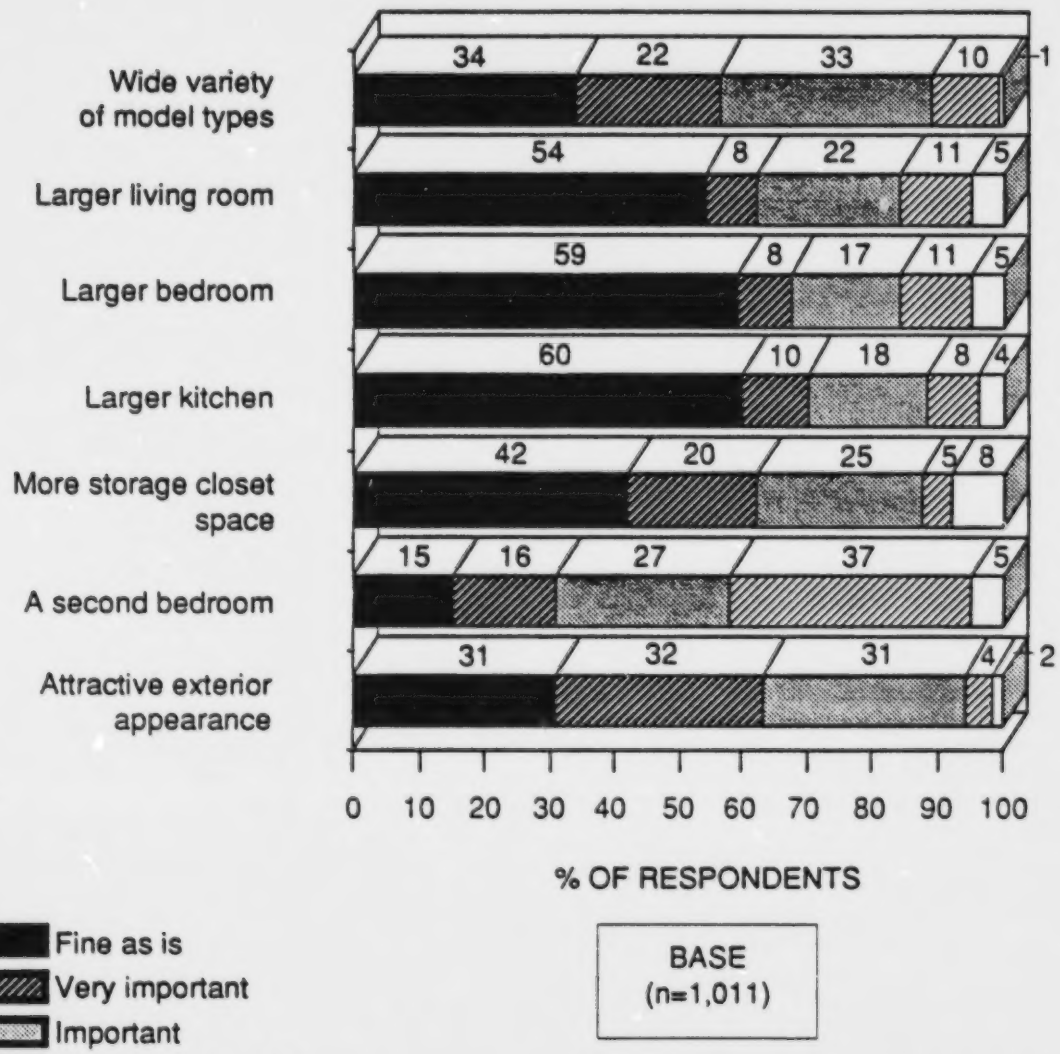
* Exhibit 4.11 lists all concerns that arose regarding garden suites. These fell into five general categories related to:

  - design and facilities;
  - lot size and available space;
  - neighbourhood and zoning;
  - privacy/independence/shared space; and
  - other dislikes or comments.

* Specific concerns were generally idiosyncratic, however, with only 1% - 4% of respondents reporting any particular dislike. One exception to this was a concern about the lot being too small (expressed by 13% of respondents in the random sample).

* Particular concerns about garden suite designs and facilities included the size of the suite being too small, an unattractive exterior, a dislike of the steps,

EXHIBIT 4.12
IMPORTANCE OF FEATURES IN CONSIDERING GARDEN SUITE CONCEPT



Source: National Random Survey.

having only one entrance, the absence of a porch, a lack of storage space and poorly situated bathrooms.

Implications

- Confirming previous findings, these results indicate that design enhancements should focus on improving the exterior appearance of garden suites and providing more space for storage closets. The availability of a wide variety of models is also seen as very important.

- Second bedrooms may only be required by a minority of potential occupants.

D. IMPORTANCE OF GARDEN SUITE FEATURES

Key Findings

- Respondents were asked to rate a number of garden suite features in terms of how important they are to them in considering the garden suite concept. If any given feature appeared adequate, based on the information they had received, the respondent was asked to indicate this.

- Results taken from the national random survey are presented in Exhibit 4.12. Those features which were the most likely to be seen as adequate, based on the three illustrated models, were the size of the kitchen (60% of respondents), the size of the bedroom (59%), and the living room space available (54%). Smaller proportions of respondents felt that there was sufficient storage closet space (42%), an adequate variety of models (34%) and an attractive exterior appearance (31%).

* Similarly, 28% felt that it was important to some degree to have a larger kitchen, with 10% specifying that this was very important. Likewise, 25% felt that it was important to design larger bedrooms with only 8% reporting that it was very important. Living room space was viewed similarly with 30% overall feeling that it was important to increase its size, with 8% reporting that this was very important.

* A much larger proportion (45%) said that it was important to increase the space available for storage closets, with 20% specifying that this was very important. The importance of having a wide variety of models was important to a majority of respondents (55%), with 22% feeling that this was very important. The largest consensus was obtained with regard to the importance of an attractive exterior appearance (63%), with 32% considering this feature to be very important.

* With respect to having a second bedroom in garden suites, 43% felt that this was important but a similar proportion (37%) felt that it was not at all important.

* Other features of importance which respondents mentioned spontaneously included access for the handicapped, having a porch, deck or patio, a dining room, an outdoor garden area and air conditioning or heating units.

* Overall, results for demonstration visitors were very similar to these.

Implications

* Overall ratings of garden suite features were encouragingly positive. Furthermore, the fact that demonstration visitors gave consistently higher

ratings suggests that increased personal exposure to garden suite models may serve to improve overall perceptions.

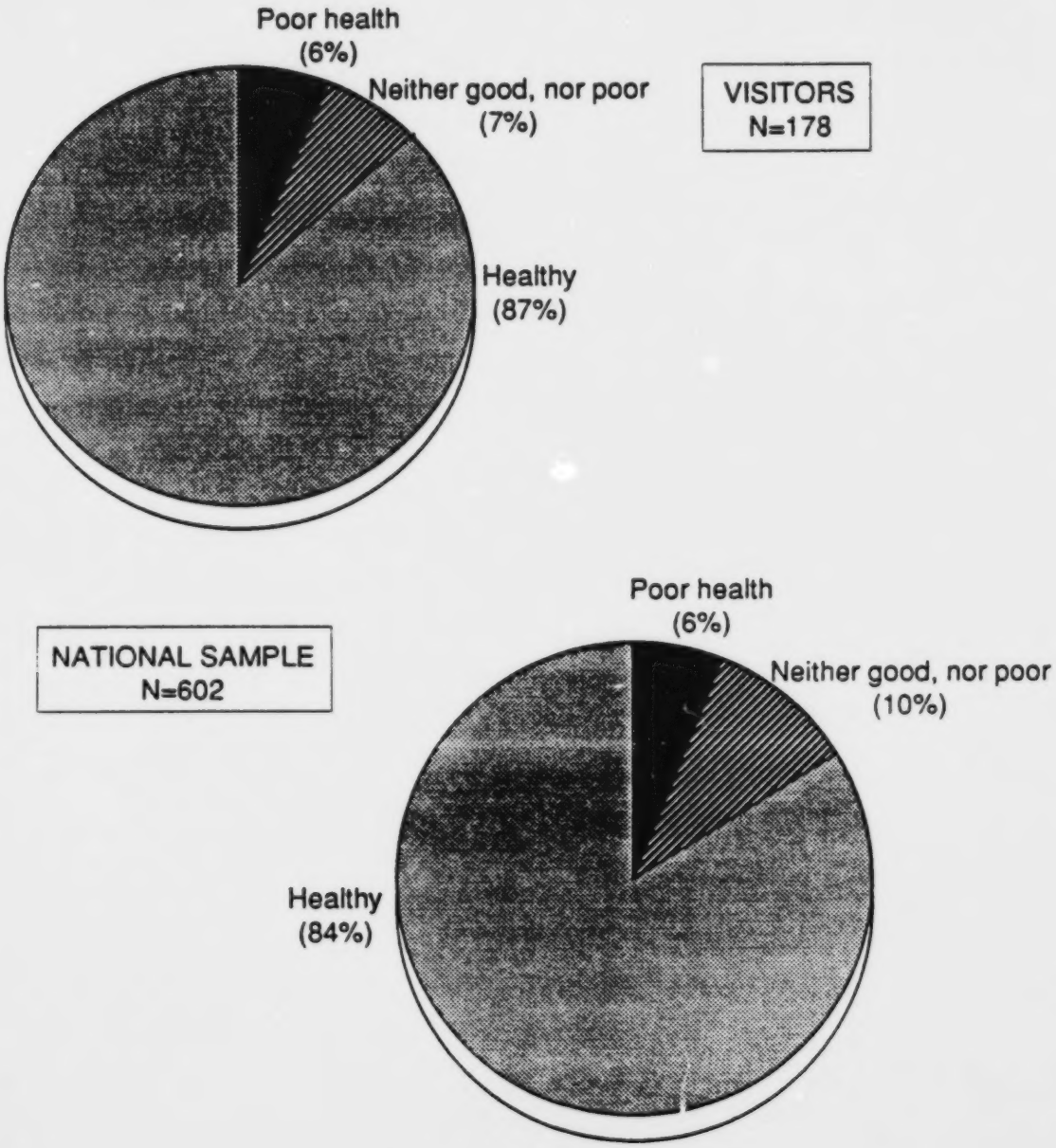
- Room for design improvement lies mostly with improved exterior appearances and increased available space overall. General comments also suggest consideration of designing a second entrance, improved design of steps and increased storage space.

- There is some evidence to suggest that the Ontario design could be enhanced with respect to its exterior appearance and facilities, and the B.C. model could be improved with respect to the overall space available.

- Lower privacy ratings for the British Columbia model may be linked to the fact that it is pictured next to a shopping mall. This suggests the importance of considering context carefully in the presentation of garden suites in promotional materials.

- Many respondents had no particular concerns or dislikes about the garden suite concept. A number of non-design concerns arose, however, which could be addressed in future communications efforts. Specifically, materials should include specifics about lot sizes and how different models can be accommodated on smaller lots, how steps can be taken to minimize neighbourhood impact, possible financing alternatives, and an emphasis on retaining independence and privacy with garden suites.

EXHIBIT 5.1
HEALTH OF ELDERLY CANADIANS



V. SPECIAL NEEDS OF OCCUPANTS

A. HEALTH OF OCCUPANTS

Key Findings

* As Exhibit 5.1 shows, elderly Canadians who are considered potential occupants of garden suites describe their health in positive terms (from good to excellent). Almost 88% of those who visited a demonstration site and nearly 85% of the general elderly population felt healthy.

* This sense of good health did not vary from province to province or by community size, and was unaffected by the age or sex of the respondent.

Implications

* Institutional care for reasons of chronic health problems does not appear to be a primary consideration in assessing the acceptability of this housing option for elderly Canadians.

* In discussing the need for support services, however, those mentioned closely parallel the services that are considered to be standard for institutional care facilities (see Section C: Support Services Required).

EXHIBIT 5.2

PERCEPTION THAT GARDEN SUITE WOULD OFFER COMFORTABLE LIVING

	VISITOR		RANDOM	
	Occupant (%)	Host (%)	Occupant (%)	Host (%)
Yes	89	94	77	83
No	10	5	21	16
Don't Know/ Not Stated	1	-	2	2
BASE (n=)	(178)	(299)	(602)	(883)

B. PERCEIVED COMFORT OF GARDEN SUITES

Key Findings

* The majority of potential occupants believe that the garden suite concept would allow them the level of comfort they are personally seeking in housing and the majority of hosts feel it would meet the comfort level they perceive necessary for their parents.

* This belief is considerably stronger among those Canadians who have benefitted from a visit to a demonstration site (see Exhibit 5.2). Of visitors 92% expressed their belief in the comfort of the units, as does 80% of the general population.

* Conversely, the poorest acceptance of the garden suites as a comfortable housing option comes from potential occupants who have not visited a demonstration site (21%).

* There is little to no statistical provincial urban vs. rural variation to these national findings when the results are examined at the aggregate level of sample populations.

* When disaggregated for sub-groups, there are significant exceptions for potential occupants. Within Quebec, over a third of visitor occupants and just under a third of national sample occupants do not believe they would be comfortable in a garden suite; a third of national sample occupants from Manitoba felt the same.

EXHIBIT 5.3

REASONS FOR SAYING RESPONDENT WOULD BE UNCOMFORTABLE LIVING IN A GARDEN SUITE

Reasons	Visitors (%)	Random (%)
Too small/too cramped/no space	41	39
Likes home where they live now	35	26
Loss of independence	0	18
Don't want to live close together	0	6
Loss of privacy	0	4
Prefer to be around people own age	0	2
Can find better accommodation	0	4
Not enough recreation/activities	3	3
Dislike idea of being alone	0	2
Other	27	15
BASE (n=)	(34)	(263)

Note: Respondents not limited to a single reason

- Principal reasons expressed by those who are worried about life in a garden suite, as Exhibit 5.3 indicates, are the small size of the units (41% for those who visited the demonstration site and 39% for the national population) and a preference for an existing residence (35% of visitors and 26% of the national population). In addition, 18% of the national population expressed concern that they would suffer a loss of independence.

- Key determinants for potential discomfort were more numerous for national sample respondents than for those who visited the site.

- When the data are disaggregated further to examine provincial results, very little variation was noted. In the cases of Quebec and Manitoba mentioned above, discomfort with the units stems from their small size, a preference for existing residences and a fear of loss of independence.

Implications

- Visiting a garden unit has a positive influence on the acceptability of this housing option for elderly Canadians.

- While respondents did not reject the concept, they expressed opinions on personal comfort or the personal comfort of parents. Discomfort is associated primarily with the small size and an attachment to an existing home.

- The concept of comfort is unaffected by considerations of price, affordability or the decision to buy or rent.

EXHIBIT 5.4

SUPPORT SERVICES REQUIRED TO LIVE COMFORTABLY IN A GARDEN SUITE IN ADDITION TO HELP PROVIDED BY HOSTS

Support Services	Random Sample (%))	Visitor Sample (%)
Quick response in case of emergencies	68	64
Transportation on call when necessary	52	49
Health care	48	42
Homecare (e.g., housekeeping services)	42	42
Special services - visually/ hearing impaired	41	37
Personal care (e.g., visit of nurse)	40	36
Meal preparation	24	22
Don't know	2	2
BASE (n=) (multiple responses accepted)	1,485	477

- The primary implication of these findings underscores for both CMHC and the manufactured housing industry the importance of concrete examples of garden units for examination by Canadians. The novelty of the concept mitigates somewhat against ready acceptance. Promotional materials strengthen the tendency to accept, but a tangible working unit is the strongest selling tool.

C. SUPPORT SERVICES REQUIRED

Key Findings

- To be comfortable in a garden suite, just under a fifth (17%) of Canadians believe that no additional support services are necessary.

- For the balance, Exhibit 5.4 displays the ranking of those types of services considered important to comfort in a garden suite. At the top is concern for responses to emergency and at the bottom concern for meal preparations.

- The relative ranking of services holds whether a respondent had visited a suite or not. In addition, there is no significant variation in this relative ranking among provinces or between rural and urban respondents.

- In citing additional support services, brief mention was made of:

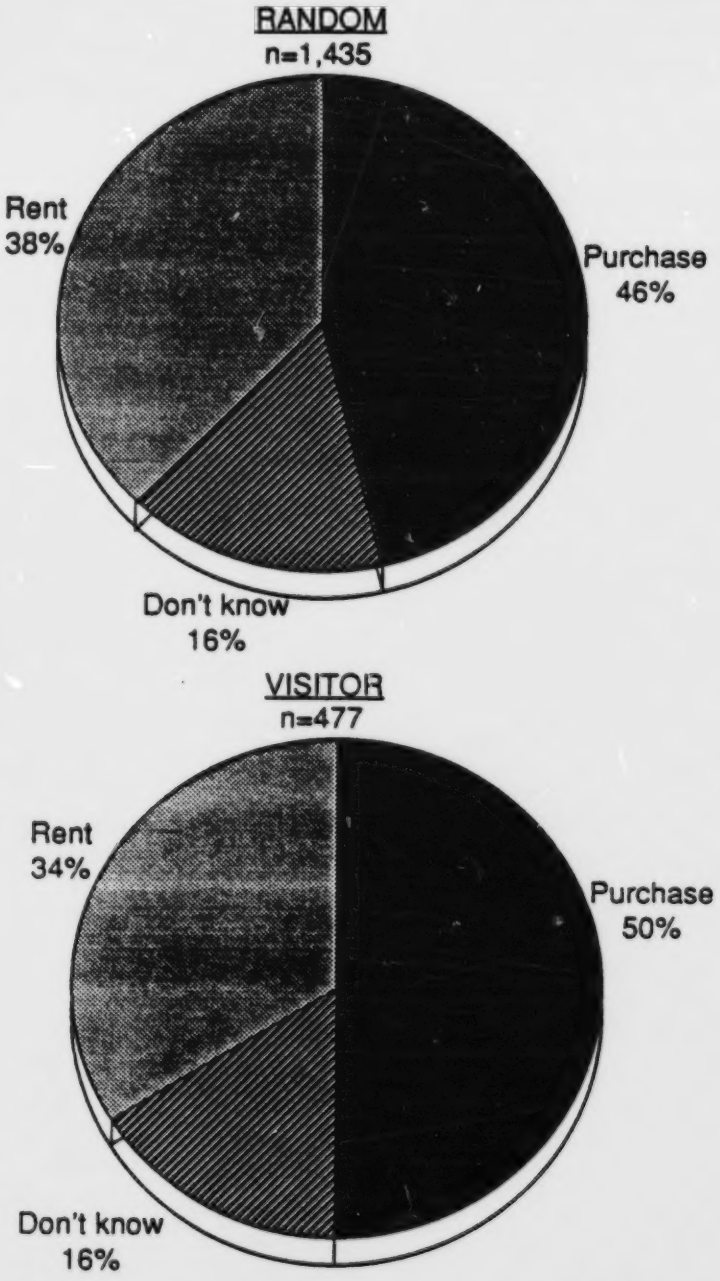
  - concern over handicap access;
  - availability of maintenance repair person;
  - delivery services from shops; and
  - entertainment/recreation centres in the area.

Implications

- Canadians have firm conceptions of what support services must be provided for the elderly. Regardless of what housing option is considered, they expect that such services will be available.

- To allow the elderly to enjoy the independence they believe is afforded by the garden suite, it is necessary to provide a balanced set of support services in this setting. Policy, regulatory and administrative procedure changes in the delivery of such services may be required. The extent to which these services are available may prove to be a salient feature in the marketability of this housing option.

EXHIBIT 6.1
PREFERENCE FOR BUYING OR RENTING GARDEN SUITES



VI. PRICE SENSITIVITY

INTRODUCTION

In this chapter, we summarize the findings relative to pricing issues. Respondents were asked a number of questions ranging from their impressions of price for both the rental and purchase of garden suites, their preference of whether to purchase or rent, whether they could afford to purchase or rent and specifically what amounts they could afford in each instance. To the extent possible, demographic profiles of respondents who indicated either preference were also compiled. These profiles further highlight the differences between the potential host and occupant sub-groups.

Since price sensitivity is largely affected by regional differences and to some extent by community size, both of these variables are discussed in relation to price perceptions.

A. PREFERENCE FOR BUYING VS. RENTING GARDEN SUITES

Key Findings

- Based on the national random survey, the data results indicate a somewhat greater preference to purchase garden suites (46%) than to rent them (38%), with the balance (16%) not stating a preference.

- As shown in Exhibit 6.1, visitors showed a similar preference pattern.

- Exhibit 6.2 highlights the breakdown of preference for buying or renting by potential occupants and hosts. As shown, these groups show a similar preference pattern although potential hosts were slightly more in favour of purchasing the suite compared to occupants.

EXHIBIT 6.2

BREAKDOWN OF PREFERENCE FOR BUYING/RENTING

Random

	Host (%)	Occupant (%)
Purchase	49	42
Rent	37	41
Don't know	14	18
BASE (n=)	(883)	(602)

Visitor

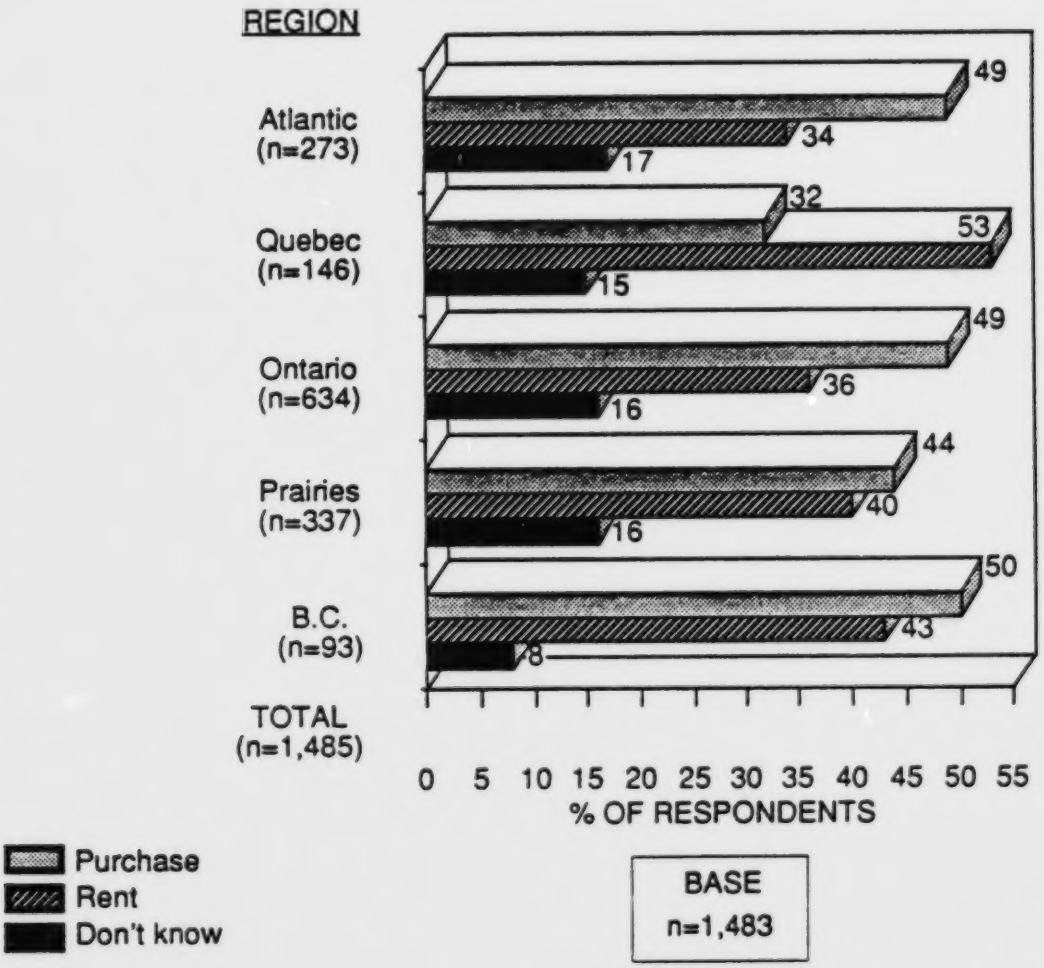
	Host (%)	Occupant (%)
Purchase	52	48
Rent	34	34
Don't know	14	19
BASE (n=)	(299)	(178)

EXHIBIT 6.3
DEMOGRAPHIC GROUPS MOST LIKELY AND LEAST LIKELY TO PREFER PURCHASING GARDEN UNITS
(National Random Survey)

Most Likely	New Brunswick resident	56%
	University educated	57%
	Single	56%
	Income over $40K	54%
National average		46%
Least Likely	Quebec resident	32%
	French	33%
	Public school education	38%
	Age 65+	37%
	Retired	32%
	Income under $20K	38%
	Cannot afford to buy	33%

Gallup

EXHIBIT 6.4
PREFERENCE TO BUY OR RENT BY REGION



Source: National Random Survey.

- A number of important demographic differences were found between those who preferred buying to renting garden suites. Exhibit 6.3 highlights these differences by presenting those groups who were most likely and least likely to prefer the purchase option.

- As shown, residents of New Brunswick (56%) were among the most likely to prefer buying a suite, with Quebec residents being the least likely (32%). (Complete breakdowns are provided in Exhibit 6.4.)

- Single people and those with university educations and incomes over $40,000 were also more likely to prefer purchasing a suite. The least likely included French Canadians, those with a public school education, senior citizens, retired individuals, those with incomes below $20,000 and those who stated they could not afford to buy a unit.

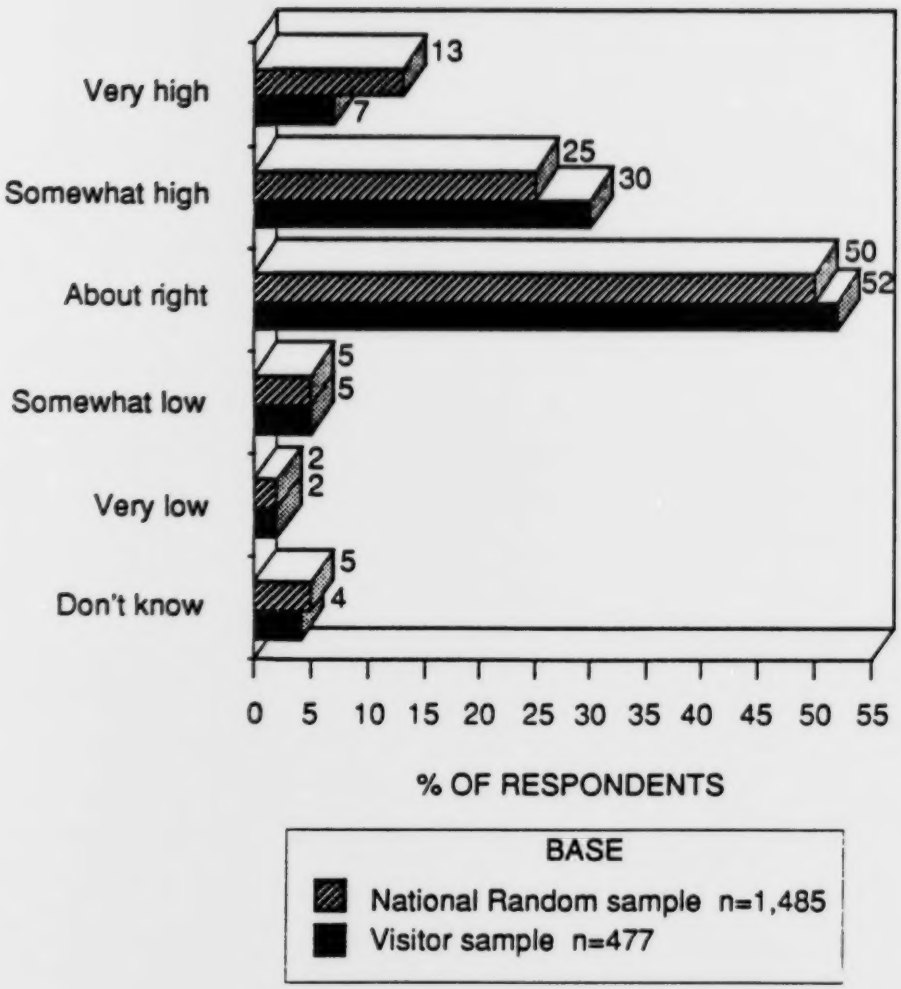
- Conversely, those most likely to prefer renting a unit include French Canadians (52%), residents of Quebec (53%), those aged 65 - 69 (48%) and those who cannot afford to buy (48%).

- No significant differences were found based on community size.

Implications

- While there is an overall preference for buying garden suites, it will be important to offer both purchase and rental options to potential occupants and hosts in all regions. The rental option will be particularly important in Quebec and for French Canadians in general.

EXHIBIT 6.5
GENERAL IMPRESSION OF PURCHASE PRICE



B. REACTION TO RELATIVE MARKET PRICES

Respondents were given and asked to comment on information regarding the probable provincial market price of suites for both purchase and rental considerations. A list of all prices quoted is presented in Appendix III.

Key Findings

1. Purchase price considerations

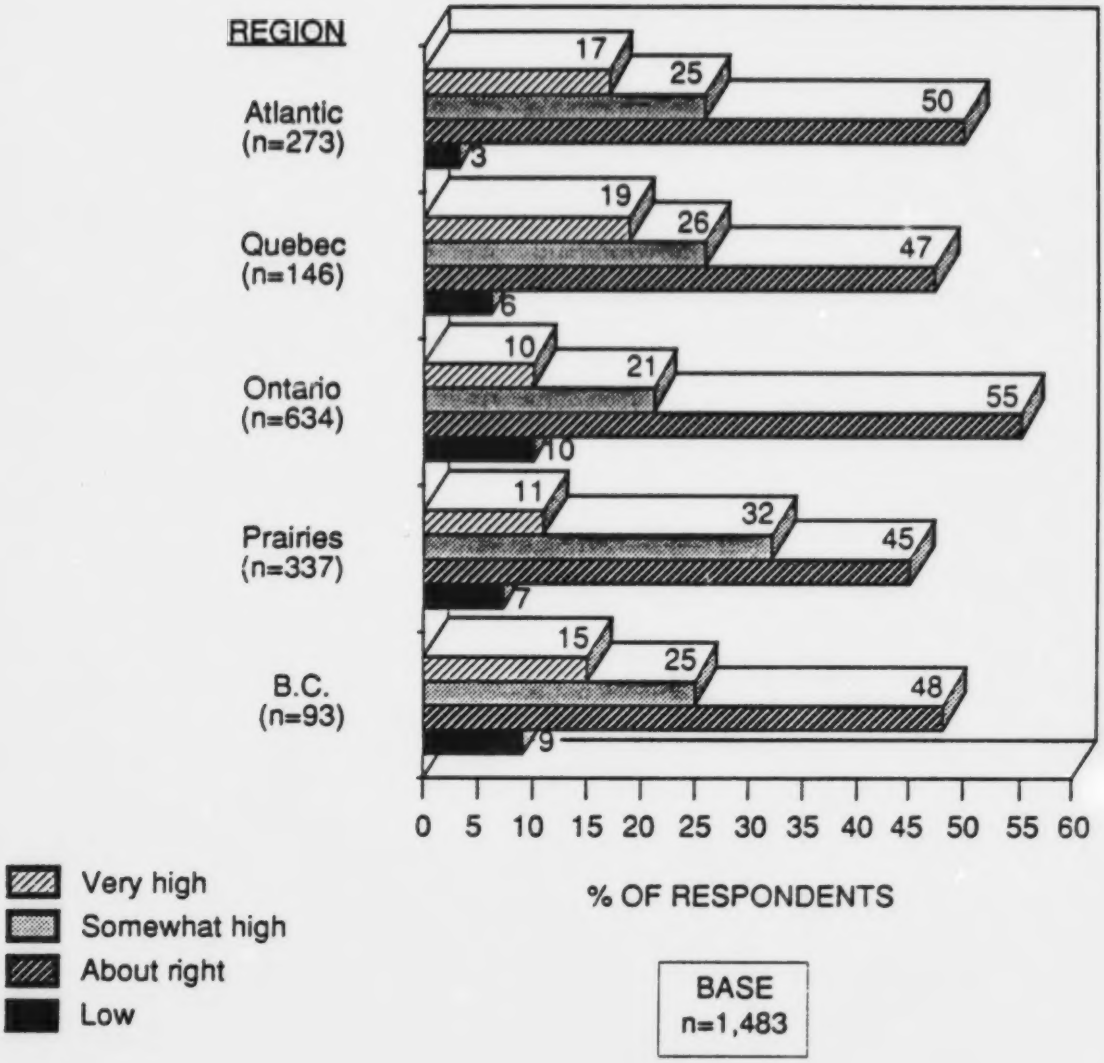
- As shown in Exhibit 6.5, of the total random survey sample, including both hosts and occupants, half felt that the purchase price of the garden suites was about right. A substantial proportion (37%) felt that the price of the suite was somewhat or very high. Only 7% felt that the price was low. Similar results were found for the demonstration visitors surveyed.

- There were no significant differences between host and occupant attitudes about price.

- Regional results are presented in Exhibit 6.6. Overall, Quebec residents were the most likely to find purchase prices high (45%), with Ontario being the least likely (30%).

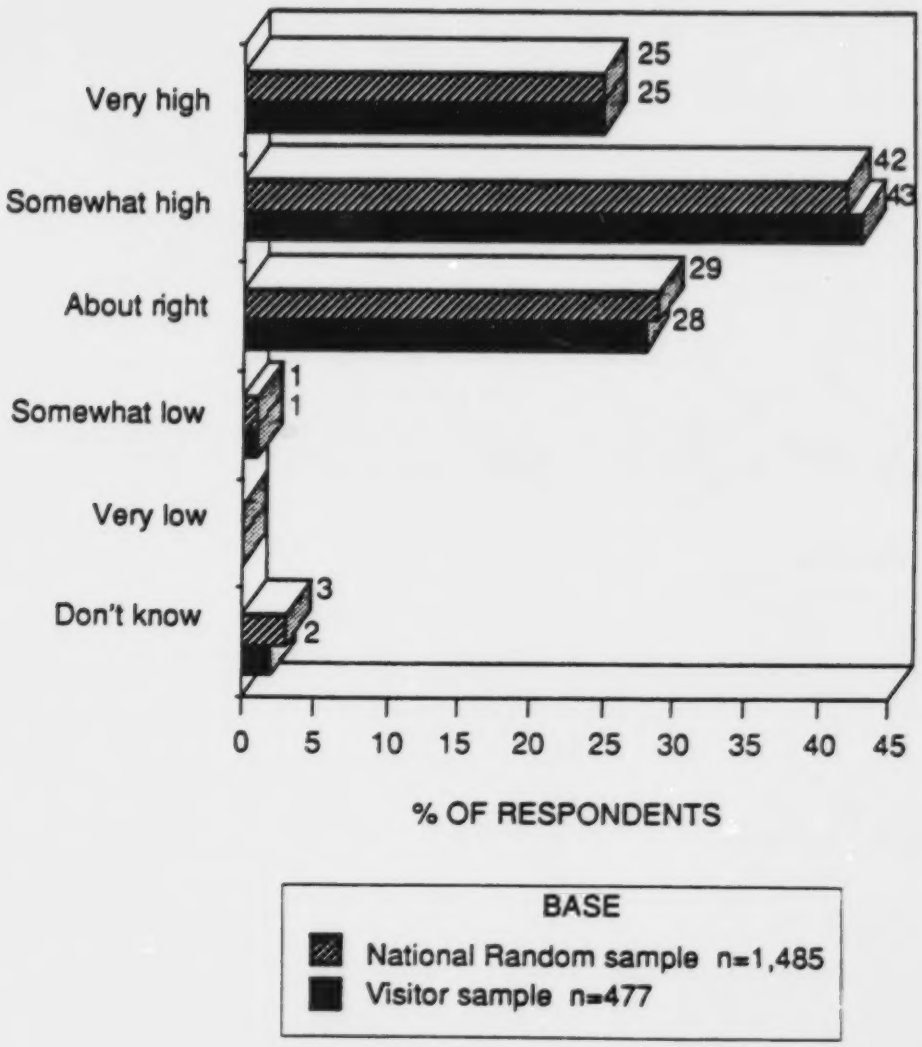
- Residents of rural communities (under 10 M) were also the most likely to find prices high (43%), with those in large urban centres (500 M+) being the least likely (30%).

EXHIBIT 6.6
GENERAL IMPRESSION OF PURCHASE PRICE BY REGION



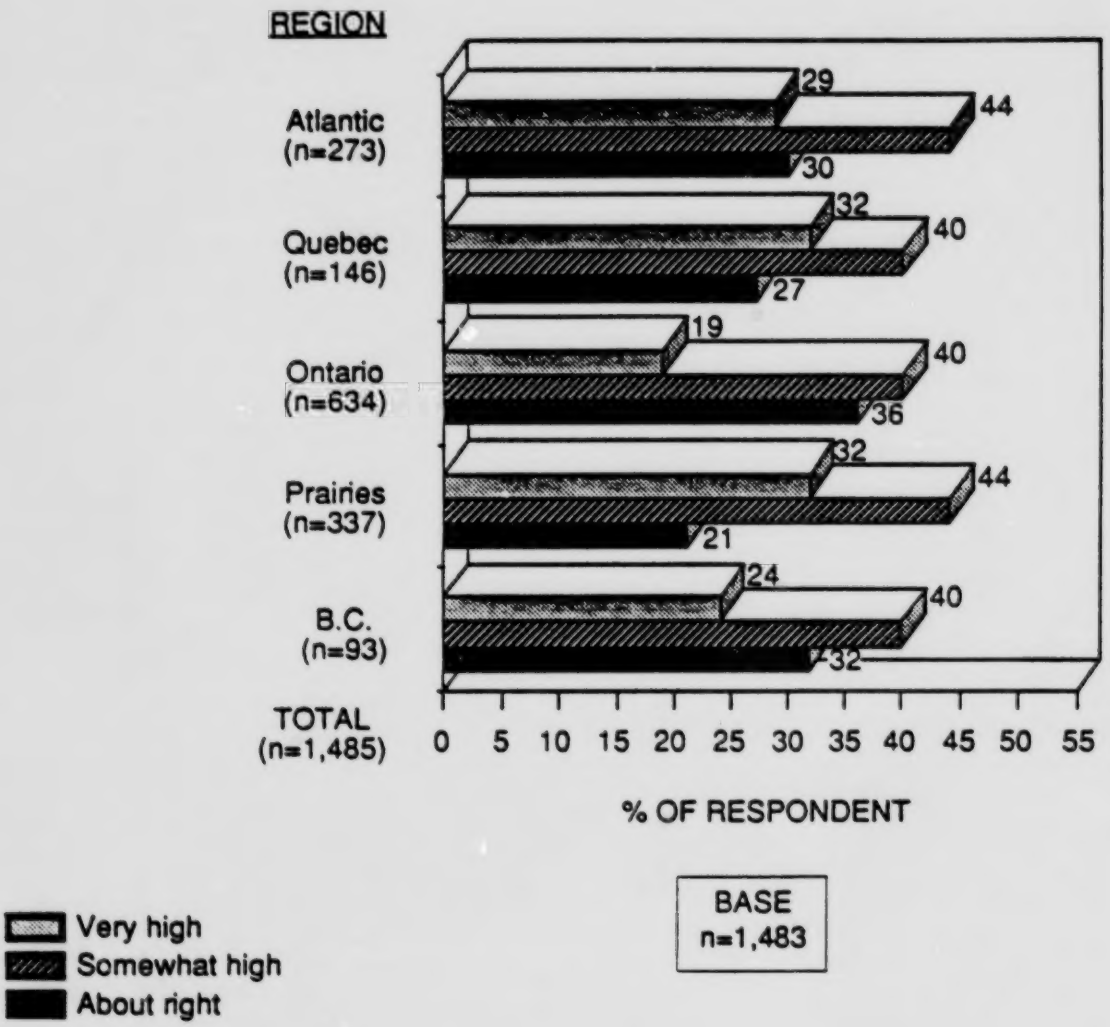
Source: National Random Survey.

EXHIBIT 6.7
GENERAL IMPRESSION OF RENTAL PRICE



Gallup

EXHIBIT 6.8
GENERAL IMPRESSION OF RENTAL PRICE BY REGION



Source: National Random Survey.

2. Garden Suite Rental Price Considerations

- Exhibit 6.7 presents the general impressions of rental price both for the national random survey sample and for demonstration visitors. In general, rental prices are considered to be high much more frequently than was the case for purchase prices (37%).

- There are no significant differences between the national random survey and visitor respondents.

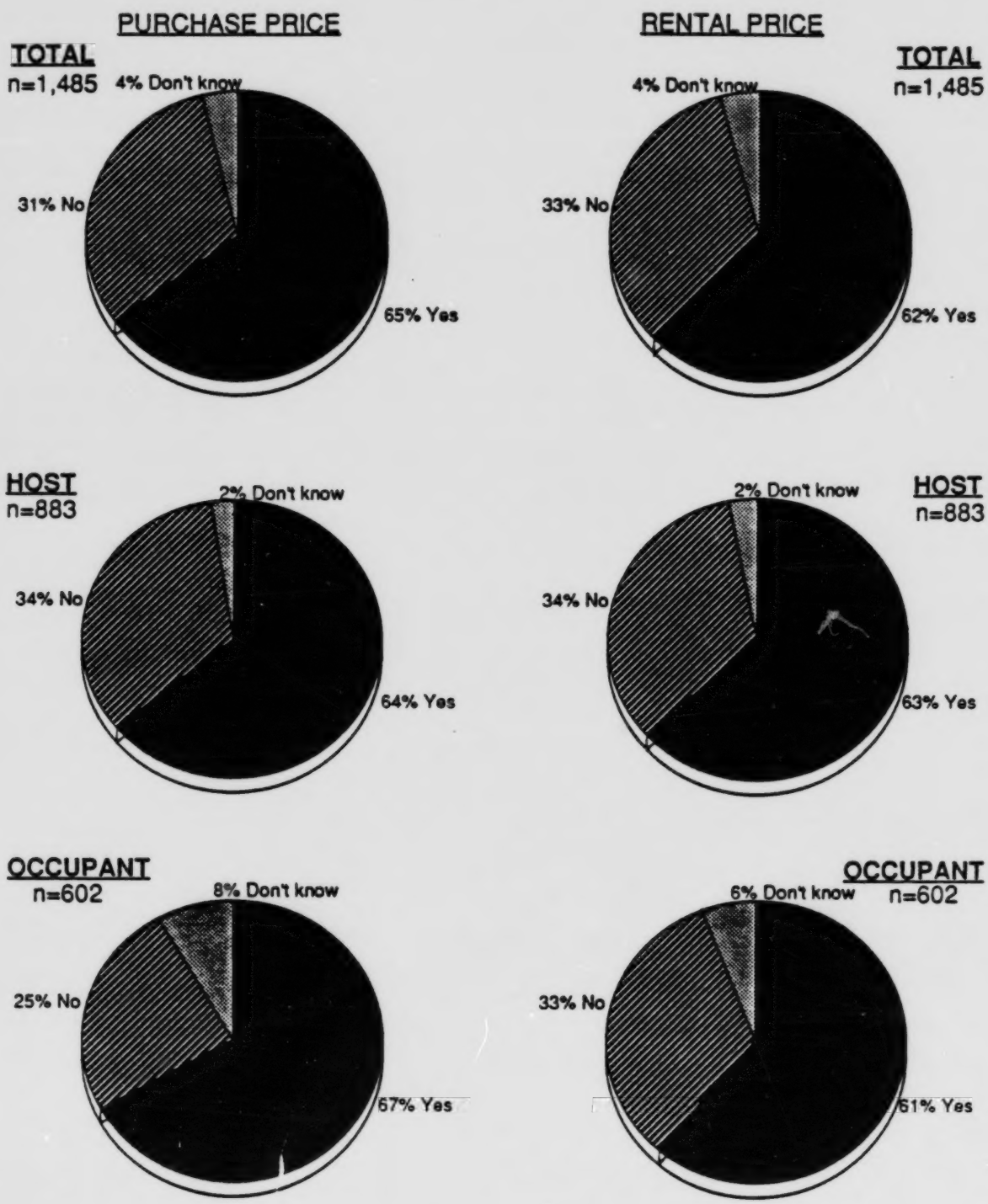
- Exhibit 6.8 breaks down the reaction to rental price by region. As shown, Prairie residents were the most likely to find rental prices high (75%), as were residents of the Atlantic region (73%) and Quebec (72%). Once again, Ontario residents were the least likely to find prices high (59%), followed by British Columbia (63%).

- As was the case for perceptions of purchase price, residents of rural communities were the most likely to consider rental prices of garden suites high (73%), with residents of larger urban centres being the least likely (58%).

Implications

- Current purchase price options are generally seen as acceptable whereas rental prices are more typically perceived as too high. Findings suggest that different pricing options will be required to accommodate different segments of the potential market. Consideration of lower prices will be particularly important in Quebec and in rural communities.

EXHIBIT 6.9
INCIDENCE OF AFFORDING GARDEN SUITE



C. AFFORDABILITY OF GARDEN SUITES

Key Findings

- With respect to the purchase of garden suites and the rental of these suites, respondents were asked two basic questions. First, they were asked outright whether they could afford to purchase or rent the garden suite at a stated price. Respondents who could not afford the quoted price were then asked the amount of money they could afford to pay towards the purchase or rent of a garden suite.

- Exhibit 6.9 presents the overall results of the incidence of affording the garden suites, based on the national random survey. As shown, the majority of respondents (65%) said that they could afford the purchase price. A similar proportion (62%) also indicated that they could afford the rental price (in spite of the fact that the rental price was generally considered to be high). Both potential occupants and potential hosts had a similar incidence of being able to afford a garden suite, either on a purchase or rental basis.

- Exhibit 6.10 identifies the demographic groups most likely and least likely to afford the quoted purchase price of garden suites.

- Those most likely to afford the purchase price include residents of Ontario, singles, those with a university education and those with incomes of $40,000 or more.

- Respondents who are from Quebec and the Atlantic region, those who have lower education and income, those who speak French, and those who are

EXHIBIT 6.10
DEMOGRAPHIC GROUPS MOST LIKELY/LEAST LIKELY TO AFFORD PURCHASE PRICE

Most Likely	Ontario	75%
	Single	80%
	University education	79%
	Income $40K & over	80%
National average		65%
Least Likely	Quebec	51%
	Atlantic region	55%
	French	53%
	Public school education	46%
	Widowed/Separated/Divorced	55%
	Income under $30K	52%

Source: National Random Survey.

EXHIBIT 6.11
DEMOGRAPHIC GROUPS OF THOSE MOST LIKELY/LEAST LIKELY TO AFFORD RENTAL PRICE

Most Likely	University education	80%
	Income over $40K	75%
	Single	83%
	Male	73%

National average	62%

Least Likely	Quebec	49%
	75+	52%
	French	47%
	Public school education	41%
	Income under $20K	43%

Gallup

EXHIBIT 6.12

PURCHASE PRICE AMOUNT THAT RESPONDENTS CAN AFFORD

		Region				
	Total	Atlantic	Quebec	Ontario	Prairies	British Columbia
			% of Respondents			
$5,000 or less	7	5	4	6	10	14
$50,001 - $10,000	8	5	7	8	12	11
$10,001 - $15,000	4	7	1	1	6	3
$15,001 - $20,000	11	11	19	6	14	11
$20,001 - $25,000	8	7	17	5	7	8
$25,001 or more	2	1	-	5	0	0
None	22	16	17	30	21	22
Don't know	38	49	35	39	31	31
BASE (n=)	(521)	(122)	(72)	(160)	(130)	(36)

Source: National Random Survey

widowed, separated or divorced are the least likely to afford the purchase price.

- No significant variation by community size was found.

- A similar demographic profile was found for those who were least and most likely to afford the rental price of garden suites. Those most likely included singles, males, those with a university education and those with incomes over $40,000. Those least likely included residents of Quebec, francophones, seniors aged 75+, those with a public school education and those with incomes less than $20,000. Results are summarized in Exhibit 6.11.

- Based on respondents who could not afford the quoted prices, Exhibit 6.12 illustrates the purchase price amounts which respondents indicated they could afford. Results are provided by region.

- On the whole, there is a rather large proportion (38%) who are not sure of the amount that they can afford. Also, a relatively large proportion (22%) indicated that they could afford nothing. 30% could afford up to $20,000 towards the purchase of the suite, with an additional 10% indicating that they could afford over $20,000.

- Ontario residents were the most likely to indicate that they couldn't afford anything (30%). Atlantic residents were the least sure of what they could afford (DK = 49%). The Prairies and British Columbia were the most likely to afford smaller amounts under $10,000 (22% and 25% respectively). Quebec residents were the most likely to report that they could afford prices over $15,000 (36%).

EXHIBIT 6.13

RENTAL PRICE AMOUNT THAT RESPONDENTS CAN AFFORD

		Region				
	Total	Atlantic	Quebec	Ontario	Prairies	British Columbia
	% of Respondents					
$100 or less	2	-	-	1	4	3
$101 - $200	12	10	16	9	17	15
$201 - $300	34	40	29	28	38	33
$301 - $400	16	10	17	20	15	21
$401 or more	1	3	1	2	-	-
None	11	6	15	12	10	12
Don't know	24	31	21	29	16	15
BASE (n=)	(562)	(116)	(75)	(198)	(138)	(33)

Source: National Random Survey

- Exhibit 6.13 presents corresponding rental price amounts by region.

- A significant proportion (64%) are able to contribute up to $400 towards the rent. The most frequently reported rental price affordable is between $201 - $300 (34%).

Implications

- Affordability results were generally positive, indicating that while prices may be seen as too high, they remain affordable for a majority of the target market.

- The sensitivity to pricing evident in this study has broad economic, social, policy and marketing implications.

- Within the broader economic context, the pricing of suites will be critical for take-up as it is for real estate in general. Since there are some alternatives to housing for the elderly, it is likely that demand for the suites will be price elastic, i.e., with demand responding to changes in the price structure.

- Purchase/rent decisions within the macro-environment are influenced by economic conditions in general and more specifically, by fluctuations in interest rates. Any increase in interest rates will adversely affect demand.

- Because of variations in response to pricing by region, and size of community, the pricing strategy will have to take into account the relative market conditions in the respective regions in addition to general economic conditions.

- Any pricing strategy contemplated will have to consider the various approaches possible. If the objective is to stimulate take-up as much as possible, then promotional or competitive pricing is required. At present, it does not appear that the pricing is perceived to be competitive relative to the market, since only 50% believe the purchase price to be right, and only 29% felt that the rental price was about right.

- Alternatively, the objective may be to provide accommodations only to those who currently desire it and can afford it. This would represent the core target market. However, the needs of those who desire the suites but cannot afford them must also be addressed in terms of the availability of financing, subsidy or grant. A regional index can be compiled taking into account market conditions and affordability. Such an index can be used for any pricing and funding decisions.

- The pricing information provided to respondents was incomplete. Purchase or rental of suites will likely include other costs such as taxes, maintenance, etc. These additional costs also impact upon price sensitivity and therefore must be considered.

VII. SUMMARY OF MARKETING IMPLICATIONS

A. TOTAL POTENTIAL MARKET FOR GARDEN SUITES

- The total potential market for garden suites covers a substantial proportion of the Canadian population. Approximately 45% of elderly Canadian households qualify as potential occupants of Garden suites. Potential host families number approximately 2.66 million across Canada.

- While the total market potential is large, the current level of interest in using garden suites (discussed below) indicates that the likely demand will be softer.

- Given that the population of Canadians aged 60 or older is expected to grow in the decades ahead, absolute numbers of potential occupants is also likely to grow. And while the size of the potential host market, as defined in this study, is likely to shrink in the years to come, its current size relative to potential occupants suggests that it will likely continue to exceed the number of potential occupants.

- While provinces vary in terms of potential market strength, each show a firm base of potential hosts and occupants. Minimally, however, national communications efforts directed at either potential occupants or hosts should include the large markets of Ontario, Quebec, British Columbia and Alberta.

- Socio-demographic profiles of potential markets provide important insights for developing targetted promotional and marketing campaigns, both at the national and regional levels. Current findings suggest that there are enough commonalities across regions to allow for national marketing strategies. By the same token, given that there are some important differences across both

regions and potential occupants and hosts, more targetted efforts should serve to enhance marketing strategies at a national level.

- Awareness - building will be an important consideration for marketing efforts in the future. While a substantial base currently exists, there is considerable room for expanding awareness, particularly among the francophone population and residents of Quebec and New Brunswick.

B. LIKELIHOOD OF USE AND PREFERRED LOCATION

- A visit to a garden suite has a positive effect on personal impressions of the housing concept. This, in turn, has an impact on the belief that elderly Canadians are likely to accept the concept.

- There is a positive relationship between the belief of a potential host that a parent would want to live in a garden suite and the likelihood that they would be willing to install a unit on their property.

- Unlikelihood of wanting to live in a unit is based on circumstances owing to existing housing or the perceived loss of independence and not to any inherent weakness in the design of the concept.

- Again, a visit to a garden suite appears to have a positive effect on impressions of this housing concept. Visitor occupants thought it more likely that a unit would be installed than the national sample.

- The more favourable the impression of the concept, the greater the belief in the likelihood that children would want to install a unit.

- The stated preference of potential occupants and the perception of occupant preferences by potential hosts are generally consistent with respect to the preferred location of garden suites.

- Existing property held by immediate family members is the preferred site for units and in the majority of cases such property is close at hand (within 50 miles or in the same province); the market potential seems clearly circumscribed with respect to location.

- Some confusion may exist concerning this housing concept. Justifications presented for residing on one's own property, for example, pertain to maintenance of freedom, independence; not burdening children; like the idea of ownership and so on. Such attributes are ascribed to the existing property location and not the garden suite. It would seem that some respondents do not accept that the concept allows for independence, maintenance of privacy, ownership and so on.

- Acceptance is based more on intangibles -- the quality of the neighbourhood, neighbourliness, existing friendships. Rejection is based more on legal, economic, and development issues. Very little of the reasoning is addressed to the specifics of design, the outside appearance or the absolute rejection of the concept.

- Marketing the concept and convincing potential hosts to install a unit are very difficult undertakings. It would seem that the general population is not predisposed to the notion but a visit to a demonstration site ameliorates the situation somewhat.

- Reasons for such a pre-disposition focus on non-design, non-legal, non-development issues. It is true that lot size, cost and zoning account for more than a third of the citations. The balance and majority of reasons, however, are less tangible, less susceptible to a clear-cut market solution. Any successful marketing strategy should take account of this observation.

- These findings also suggest that only a minority (29%) of the potential host market, as measured in Chapter II, currently represents a likely market for garden suites. At a national level, strong potential hosts are more likely to number 772,000 than 2.66 million. Those who are very likely to install a garden suite on their property number closer to 213,000. Communications will be crucial to increasing these numbers and taking advantage of the much larger potential market.

C. REACTION TO GARDEN SUITE DESIGNS

- Overall, there is a positive reaction to the concept of garden suites for elderly Canadians.

- While the more favourable impression of demonstration visitors may reflect a self-selection bias -- i.e., those who went to see a demonstration are likely to be those who were initially the most interested in the concept -- the demonstrations seem nevertheless to have a positive impact. That is, visitors remain overwhelmingly positive suggesting that they were impressed with what they saw.

- It is important that both potential hosts and occupants were equally impressed with garden suites, given that decisions concerning their use need to be of a joint nature.

- Marketing may require targetted efforts toward francophones and residents of Quebec in general, who tend to be the least impressed with garden suites. As previously reported, these groups also tended to have the lowest initial level of awareness of garden suites.

- While results are generally positive, the random survey suggests that the idea is not completely sold. Factors which would increase acceptance of garden suites will be discussed in more detail later in this report. A first gleaning of such factors suggests that some of the main concerns are with issues of property size or available space, costs and installation. Positive factors seem to include the concept itself with related benefits of having family close by while maintaining independence, as well as the actual designs and layouts currently put forward.

- The British Columbia design is the most attractive to all respondents, due primarily to its exterior appearance and overall looks. The strengths of other models lie in their overall shape and size or the layout of the rooms and facilities.

- Exterior appearance is obviously a salient issue to potential garden suite users. Given an attractive exterior, however, other design issues should take on increasing importance.

- Confirming previous findings, these results indicate that design enhancements should focus on improving the exterior appearance of garden suites and providing more space for storage closets. The availability of a wide variety of models is also seen as very important.

- Second bedrooms may only be required by a minority of potential occupants.

- Overall ratings of garden suite features were encouragingly positive. Furthermore, the fact that demonstration visitors gave consistently higher ratings suggests that increased personal exposure to garden suite models may serve to improve overall perceptions.

- Room for design improvement lies mostly with improved exterior appearances and increased available space overall. General comments also suggest consideration of designing a second entrance, improved design of steps and increased storage space.

- There is some evidence to suggest that the Ontario design could be enhanced with respect to its exterior appearance and facilities, and the B.C. model could be improved with respect to the overall space available.

- Lower privacy ratings for the British Columbia model may be linked to the fact that it is pictured next to a shopping mall. This suggests the importance of considering context carefully in the presentation of garden suites in promotional materials.

- Many respondents had no particular concerns or dislikes about the garden suite concept. A number of non-design concerns arose, however, which could be addressed in future communications efforts. Specifically, materials should include specifics about lot sizes and how different models can be accommodated on smaller lots, how steps can be taken to minimize neighbourhood impact, possible financing alternatives, and an emphasis on retaining independence and privacy with garden suites.

D. SPECIAL NEEDS OF OCCUPANTS

- Institutional care for reasons of chronic health problems does not appear to be a primary consideration in assessing the acceptability of this housing option for elderly Canadians.

- In discussing the need for support services, however, those mentioned closely parallel the services that are considered to be standard for institutional care facilities.

- Visiting a garden unit has a positive influence on the acceptability of this housing option for elderly Canadians.

- While respondents did not reject the concept, they expressed opinions on personal comfort or the personal comfort of parents. Discomfort is associated primarily with the small size and an attachment to an existing home.

- The concept of comfort is unaffected by considerations of price, affordability or the decision to buy or rent.

- The primary implication of these findings underscores for both CMHC and the manufactured housing industry the importance of concrete examples of garden units for examination by Canadians. The novelty of the concept mitigates somewhat against ready acceptance. Promotional materials strengthen the tendency to accept, but a tangible working unit is the strongest selling tool.

- Canadians have firm conceptions of what support services must be provided for the elderly. Regardless of what housing option is considered, they expect that such services will be available.

- To allow the elderly to enjoy the independence they believe is afforded by the garden suite must be balanced with the provision of support services in this setting. Policy, regulatory and administrative procedure changes in the delivery of such services may be required. The extent to which these services are available may prove to be a salient feature in the marketability of this housing option.

E. PRICE SENSITIVITY

- While there is an overall preference for buying garden suites, it will be important to offer both purchase and rental options to potential occupants and hosts in all regions. The rental option will be particularly important in Quebec and for French Canadians in general.

- Current purchase price options are generally seen as acceptable whereas rental prices are more typically perceived as too high. Findings suggest that different pricing options will be required to accommodate different segments of the potential market. Consideration of lower prices will be particularly important in Quebec and in rural communities.

- Affordability results were generally positive, indicating that while prices may be seen as too high, they remain affordable for a majority of the target market.

- The sensitivity to pricing evident in this study has broad economic, social, policy and marketing implications.

- Within the broader economic context, the pricing of suites will be critical for take-up as it is for real estate in general. Since there are some alternatives to housing for the elderly, it is likely that demand for the suites will be price elastic, i.e., with demand responding to changes in the price structure.

- Purchase/rent decisions within the macro-environment are influenced by economic conditions in general and more specifically, by fluctuations in interest rates. Any increase in interest rates will adversely affect demand.

- Because of variations in response to pricing by region, and size of community, the pricing strategy will have to take into account the relative market conditions in the respective regions in addition to general economic conditions.

- Any pricing strategy contemplated will have to consider the various approaches possible. If the objective is to stimulate take-up as much as possible, then promotional or competitive pricing is required. At present, it does not appear that the pricing is perceived to be competitive relative to the market, since only 50% believe the purchase price to be right, and only 29% felt that the rental price was about right.

- Alternatively, the objective may be to provide accommodations only to those who currently desire it and can afford it. This would represent the core target market. However, the needs of those who desire the suites but cannot afford them must also be addressed in terms of the availability of financing, subsidy or grant. A regional index can be compiled taking into account

market conditions and affordability. Such an index can be used for any pricing and funding decisions.

- The pricing information provided to respondents was incomplete. Purchase or rental of suites will likely include other costs such as taxes, maintenance, etc. These additional costs also impact upon price sensitivity and therefore must be considered.

APPENDIX I

SURVEY INSTRUMENTS

THE CANADIAN GALLUP POLL LTD PROJECT:721

GARDEN SUITE
- RANDOM SAMPLE VERSION -

Good...my name is...from the Gallup Poll. May I please speak to the (male/female) head of the household.

REINTRODUCE YOURSELF IF NECESSARY AND SAY: We are doing a study for the government about a new type of housing accommodation for seniors called garden suites, also called granny flats, and would like your opinions.

SECTION A: GENERAL SCREENING

1. Prior to today, were you aware of garden suites? -31

YES	1	
NO	2	

2. In which of the following age categories do you belong? READ LIST

Less than 18	1	→ THANK & TERMINATE
18 to 59	2	→ CHECK QUOTA, GO TO SECTION B
60 or more	3	→ CHECK QUOTA, SKIP TO SECTION C

SECTION B: HOST SCREENING

3. Do you own or rent your home?

OWN	1	→ ASK Q.4
RENT	2	→ THANK & TERMINATE

IF 'OWN' IN Q.3, ASK:

4. What type of house do you own? READ LIST. ACCEPT ONE RESPONSE ONLY -33

Single detached	1	→ ASK Q.5
Semi-detached	2	→ ASK Q.5
Townhouse	3	→ THANK & TERMINATE
Condominium	4	→ THANK & TERMINATE
OTHER (SPECIFY) _____	5	→ THANK & TERMINATE

5. How many of your parents or spouse's parents are sixty years of age or older?

-34

1	1	→ ASK Q.6
2	2	
3	3	
4	4	
NONE/NO PARENTS 60+	5	→ THANK & TERMINATE
NO PARENTS LIVING	6	

IF CODES '1', '2', '3' OR '4' IN Q.5, ASK:

6. Is your property large enough to accommodate an additional building about 20 feet by 25 feet which is the size of a double garage?

YES	1 →	SKIP TO SECTION D
NO	2 →	THANK & TERMINATE

SECTION C: OCCUPANT SCREENING

7a. Do you have any children?

YES	1 →	ASK Q.7b
NO	2 →	THANK & TERMINATE

7b. Do any of them own a single or semi-detached home?

YES	1 →	ASK Q.7c
NO	2 →	THANK & TERMINATE

7c. Is the property of any one of your children large enough to accommodate an additional building about 20 feet by 25 feet which is the size of a double garage?

YES	1 →	GO TO SECTION D
NO	2 →	THANK & TERMINATE

SECTION D: CO-OPERATION TO FOLLOW-UP

8. The success of this study depends on several factors, the most important being what Canadians, like yourself, have to say about garden suites. To help us to determine future action, we would like to send you some information on garden suites in the mail and then call you back in 2 - 3 weeks to ask you a few more questions.

Would you like to help us?

YES---------- 1 ⟶ **CONTINUE**

NO---------- 2 ⟶ **THANK & TERMINATE**

Thank you!

Would you please give me your name and the address where the additional information should be mailed? **PLEASE PRINT**

NAME: _____

ADDRESS: NO: _____ STREET: _____

CITY: _____ POSTAL CODE: _____

TELEPHONE #: AREA CODE ( ) _____

9. **DO NOT ASK BUT RECORD:**

SEX OF RESPONDENT:

MALE---------- 1 -35

FEMALE---------- 2

LANGUAGE OF INTERVIEW:

ENGLISH---------- 1 -36

FRENCH---------- 2

PROVINCE OF RESPONDENT:

BRITISH COLUMBIA---------- 1 -37

ALBERTA---------- 2

SASKATCHEWAN---------- 3

MANITOBA---------- 4

ONTARIO---------- 5

QUEBEC---------- 6

NEW BRUNSWICK---------- 7

PEI ---- 8

NOVA SCOTIA - 9

NFLD -- 0

ASSIGNMENT NUMBER: _____ 38-41

RESPONDENT NUMBER

01

RANDOM HOST

THE CANADIAN GALLUP POLL LTD

PROJECT: 721

Good ..... my name is ..... from the Gallup Poll. May I please speak to .....

REINTRODUCE YOURSELF IF NECESSARY AND SAY: About three weeks ago someone from our office contacted you by telephone and asked you a few questions about a new type of housing accommodation for seniors called garden suites, also called granny flats. At that time you agreed to participate in a short follow-up interview after receiving some additional, more detailed information on garden suite accommodations in the mail.

1. Did you receive this additional information in the mail? -20

YES----------1 ⟶ ASK Q.2

NO----------2 ⟶ GO TO Q.7

IF 'YES' IN Q.1 ASK:

2. Did you read through this information? -21

YES----------1 ⟶ ASK Q.3a

NO----------2 ⟶ GO TO Q.7

IF 'YES' IN Q.2 ASK:

3a. Having read the garden suite information that we sent you, what is your general impression of garden suites? Would you say you are ... READ LIST -22

Very impressed?----------1 → ASK Q.3b

Somewhat impressed?----------2 → ASK Q.3b

Neither impressed or unimpressed?---3 → GO TO Q.4

Somewhat unimpressed?----------4 → GO TO Q.4

Very unimpressed?----------5 → GO TO Q.4

DON'T KNOW----------X → GO TO Q.4

IF CODES '1' OR '2' IN Q.3a, ASK:

3b. The information package you received included three different photographs and plans of garden suites. Which of the three designs did you prefer the most? **ACCEPT ONE RESPONSE ONLY. PROBE FOR SPECIFIC DESIGN, WHEN NECESSARY. IF RESPONDENT CANNOT REMEMBER, CIRCLE APPROPRIATE CODE.**

-23

DESIGN #1 (BRITISH COLUMBIA)-------1 → ASK Q.3c

DESIGN #2 (QUEBEC)----------2 → ASK Q.3c

DESIGN #3 (ONTARIO)----------3 → ASK Q.3c

CAN'T REMEMBER----------4 → GO TO Q.4

DON'T KNOW----------X → GO TO Q.4

IF CODES '1', '2' OR '3' IN Q.3b, ASK:

3c. And which design did you prefer the least? **ACCEPT ONE RESPONSE ONLY. PROBE FOR SPECIFIC DESIGN, WHEN NECESSARY. IF RESPONDENT CANNOT REMEMBER, CIRCLE APPROPRIATE CODE.**

DESIGN #1 (BRITISH COLUMBIA)-------1 -24

DESIGN #2 (QUEBEC)-----------------2

DESIGN #3 (ONTARIO)----------------3

CAN'T REMEMBER---------------------4

DON'T KNOW-------------------------X

IF 'YES' IN Q.2, ASK:

4. On a scale of 1 to 10 where '1' means very poor and '10' means very good, and '5' is the midpoint meaning you are neither positive or negative, how would you rate the <u>following characteristics</u> of the garden suite, illustrated in the information we sent you? Remember, you may choose any number between 1 and 10 that best describes your opinion. **READ LIST. ACCEPT ONE RESPONSE PER CHARACTERISTIC.**

	VERY POOR									VERY GOOD	DON'T KNOW	
a. Design? (such as exterior appearance, etc.)	1	2	3	4	5	6	7	8	9	10	X	-39
b. Facilities? (such as kitchen, bathroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-40
c. Available space? (roominess in living room, bedroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-41
d. Comfort?	1	2	3	4	5	6	7	8	9	10	X	-42
e. Individual privacy?	1	2	3	4	5	6	7	8	9	10	X	-43

5. What, if anything, do you dislike about the garden suite concept? **PROBE.** Anything else?

_____ 44-45

_____

_____ 46-47

_____

_____ 48-49

6. I am going to read to you a list of garden suite features and would like you to tell me for each one if it would be very important, important or not important at all to you in considering the garden suite concept? If a feature appeared fine as it was, based on the information we sent you, please say so. **READ LIST. ACCEPT ONE RESPONSE ONLY FOR EACH FEATURE.**

	VERY IMPOR-TANT	IMPOR-TANT	NOT IMPOR-TANT AT ALL	FINE AS WAS	DON'T KNOW	
Wide variety of model types	1	2	3	4	X	-50
More space than in examples illustrated for ... living room	1	2	3	4	X	-51
bedroom	1	2	3	4	X	-52
kitchen	1	2	3	4	X	-53
storage closets	1	2	3	4	X	-54
A second bedroom	1	2	3	4	X	-55
Attractive exterior appearance	1	2	3	4	X	-56
OTHER (please specify)						
_____ 57-58	1	2	3	4	X	-59

READ INTRODUCTION ONLY IF 'NO' IN Q.1 OR Q.2:

As you may or may not know, garden suites are small self-contained houses about the size of a double garage, 20 feet by 25 feet, that are usually placed on the same lot as the home of close family members. They are not intended as permanent additions to the lots, are easily movable and can be quickly erected with little disruption to the site. They each have a bedroom, kitchen, bathroom and living room.

ASK EVERYONE:

7. Do any of your parents or spouse's parents presently live in your home?

YES----------1 -60

NO----------2

8a. If the opportunity arose, how likely would it be that your parents or spouse's parents would want to live in a garden suite? Would it be ... **READ LIST**

-61

Very likely?----------1 ┐
Somewhat likely?----------2 ├→ **GO TO Q.9a**
Neither likely or unlikely?---------3 ┘

Somewhat unlikely?----------4 ┐
Very unlikely?----------5 ├→ **ASK Q.8b**

DON'T KNOW----------X → **GO TO Q.9a**

IF 'SOMEWHAT UNLIKELY' OR 'VERY UNLIKELY' IN Q.8a, ASK:
8b. Why do you say that? PROBE: Any other reasons?

_____ 62-63
_____
_____ 64-65
_____
_____ 66-67

IF RESPONDENT APPEARS TO BE VERY NEGATIVE ABOUT THE CONCEPT, SAY:

The information you provide us with will be very helpful in determining future action. Please be patient. Thank you.

ASK EVERYONE:
9a. If your parents or spouse's parents were going to live in a garden suite, would they be more likely to prefer to live in the garden suite ... READ LIST. ACCEPT ONE RESPONSE ONLY. -68

On your property? ----------1 ⟶ GO TO Q.10a

On their property with family, relatives or friends living in their house?----------2 ⟶ ASK Q.9b,Q.9c

On the property of another relative or friend who lives in your parents' neighbourhood---------3

On the property of another relative or friend who does not live in your parents' neighbourhood ----------4 ⟶ GO TO Q.10a

OTHER (SPECIFY)

_____5

DON'T KNOW----------X

02

IF CODE '2' IN Q.9a, ASK:
9b. What is the city and province where your parents live? MAKE SURE YOU RECORD BOTH CITY AND PROVINCE.

_____ 7-10 CITY
_____ 11 PROVINCE

9c. What is the city and province where your spouse's parents live? MAKE SURE YOU RECORD BOTH CITY AND PROVINCE.

_____ 12-14 CITY
_____ 15 PROVINCE

ASK EVERYONE:

10a. Do you feel your parents or spouse's parents would be comfortable living in a garden suite? -29

YES----------1 ⟶ **GO TO Q.11a**

NO----------2 ⟶ **ASK Q.10b**

IF 'NO' IN Q.10a, ASK:

10b. Why do you say that? **PROBE: Any other reasons?**

_____ 30-31

_____

_____ 32-33

_____

_____ 34-35

ASK EVERYONE:

11a. Which of the following types of support services do you feel would be necessary, in addition to the help that you can provide, if any of your parents or spouse's parents were to <u>comfortably</u> live in a garden suite? **READ LIST. ACCEPT MULTIPLE RESPONSE.**

Personal care (such as regular visits from nurse)----------1 -36

Health care (such as visits from doctor when necessary)----------2

Transportation for the elderly available on call when necessary----3

Homecare (such as a housekeeping service)----------4 -39 → **ASK Q.11b**

Meal preparation----------5

Quick response to requests for help in case of emergencies---------6

Special services for the visual and hearing impaired----------7 -42

NONE----------V

DON'T KNOW----------X -44 → **GO TO Q.12**

IF CODES "1", "2", "3", "4", "5", "6" OR "7" IN Q.11a, ASK:

11b. What other special needs or services, if any, might be required? **PROBE:** Any others?

_____ 45-46

_____

_____ 47-48

_____

_____ 49-50

NONE----------V

DON'T KNOW----------X

ASK EVERYONE:

12. The cost of purchasing a one-bedroom apartment in the _____ area would be at least $_____ in today's housing market. The probable purchase price for a garden suite in this area would be $_____. Do you think this purchase price for a garden suite is ... **READ LIST. ACCEPT ONE RESPONSE.**

Very high?----------1 -51

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

13. The cost of renting a one-bedroom apartment in the _____ area ranges from about $_____ a month in today's housing market. The probable monthly rent for a garden suite in this area would be $_____. Do you think this monthly rent for a garden suite is ... **READ LIST. ACCEPT ONE RESPONSE.**

Very high?----------1 -52

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

14. Would you prefer to purchase a garden suite and be able to resell it, when you want to, at a later date or would you prefer to rent a garden suite on a monthly basis? **ACCEPT ONE RESPONSE ONLY.**

PURCHASE GARDEN SUITE----------1 -53

RENT GARDEN SUITE----------2

DON'T KNOW----------X

15a. Would you and your family be able to afford the purchase price of $_____ for a garden suite in your area? .54

YES----------1 → GO TO Q.16a

NO----------2 → ASK Q.15b

DON'T KNOW----------X → ASK Q.15b

IF 'NO' OR 'DON'T KNOW' IN Q.15a, ASK:

15b. How much do you think you could afford to pay towards the purchase price of a garden suite? **PROBE, IF NECESSARY:** Just your best guess in "dollars". **MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.**

$_____ 55-59

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

ASK EVERYONE:

16a. Would you and your family be able to afford the monthly rent of $_____ for a garden suite in your area? .60

YES----------1 → GO TO Q.17a

NO----------2 → ASK Q.16b

DON'T KNOW----------X → ASK Q.16b

IF 'NO' OR 'DON'T KNOW' IN Q.16a, ASK:

16b. How much do you think you could afford to pay towards the monthly rent of a garden suite? **PROBE, IF NECESSARY.** Just your best guess in "dollars". **MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.**

$_____ 61-64

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

ASK EVERYONE:

17a. Considering your own family situation and what you have recently learned about the garden suite concept, how likely is it that you would have a garden suite installed on your property? Would it be ... **READ LIST. ACCEPT ONE RESPONSE ONLY.** .65

Very likely?----------1 → GO TO Q.18a

Somewhat likely?----------2 → GO TO Q.18a

Neither likely or unlikely?---------3 → GO TO Q.18a

Somewhat unlikely?----------4 → ASK Q.17b

Very unlikely?----------5 → ASK Q.17b

DON'T KNOW----------X → GO TO Q.18a

IF 'SOMEWHAT UNLIKELY' OR 'VERY UNLIKELY' IN Q.17a ASK:
17b. Why do you say that? **PROBE:** Any other reasons?

_____ 66-67

_____

_____ 68-69

_____

_____ 70-71

ASK EVERYONE: 03
18a. If you were to install a garden suite on your property, how likely do you think your neighbours would be to accept it? Would they be ... **READ LIST. PROBE, IF NECESSARY.**

-14

Very likely----------1
Somewhat likely----------2
Neither likely or unlikely----------3 → **ASK Q.18b**
Somewhat unlikely----------4
Very unlikely----------5
DON'T KNOW----------X → **GO TO Q.19**

IF CODES "1", "2", "3", "4", OR "5" IN Q.18a, ASK:
18b. Why do you say that? **PROBE:** Any other reasons? **RECORD BELOW.**

_____ 15-16

_____

_____ 17-18

_____

_____ 19-20

ASK EVERYONE:
19. What is your marital status?

SINGLE----------1 -21
MARRIED----------2
WIDOWED/DIVORCED/SEPARATED----------3
LIVING AS MARRIED----------4

20a. How many people, including yourself, are there in your household?

1 2 3 4 5 6 or more -22

→ **GO TO Q.21**

20b. How many would be under 10 years?

0 1 2 3 4 or more -23

20c. How many would be between 10 and 17 years?

0 1 2 3 4 or more -24

21. What was the language you first spoke in childhood and still understand?

ENGLISH----------1 -25

FRENCH----------2

OTHER (SPECIFY)
_____3

22. What was the highest level of school you completed? READ LIST.

Public or grade school----------1 -26

Some high school----------2

Graduated high school----------3

Community or technical college------4

Some university----------5

Completed university----------6

OTHER (SPECIFY)
_____7

REFUSED----------X

23. Which of the following age categories do you fall into? READ LIST.

18 to 24 years----------1 -27

25 to 29 years----------2

30 to 34 years----------3

35 to 39 years----------4

40 to 44 years----------5

45 to 49 years----------6

50 to 54 years----------7

55 to 59 years----------8

REFUSED----------X

24. Which of the following income groups includes your annual family income, before taxes? **READ LIST.**

-29

Under $20,000----------1

$20,000 - $24,999----------2

$25,000 - $29,999----------3

$30,000 - $34,999----------4

$35,000 - $39,999----------5

$40,000 - $44,999----------6

$45,000 - $49,999----------7

$50,000 or over----------8

REFUSED----------X

Thank you very much for taking the time to be interviewed. Your co-operation is most appreciated.

DATE:_____ LENGTH OF INTERVIEW:_____

I hereby certify that this interview was conducted according to the questionnaire and instructions for this study and that the answers recorded are as given to me by this respondent.

I also realize that a portion of my work will be checked back with the respondent for validation.

INTERVIEWER'S SIGNATURE:_____

RESPONDENT NUMBER

C1

RANDOM OCCUPANT

THE CANADIAN GALLUP POLL LTD PROJECT: 721

Good ..... my name is ..... from the Gallup Poll. May I please speak to .....

REINTRODUCE YOURSELF IF NECESSARY AND SAY: About three weeks ago someone from our office contacted you by telephone and asked you a few questions about a new type of housing accommodation for seniors called garden suites, also called granny flats. At that time you agreed to participate in a short follow-up interview after receiving some additional, more detailed information on garden suite accommodations in the mail.

1. Did you receive this additional information in the mail? -10

YES----------1 ⟶ ASK Q.2

NO----------2 ⟶ GO TO Q.7a

IF 'YES' IN Q.1 ASK:

2. Did you read through this information? -21

YES----------1 ⟶ ASK Q.3a

NO----------2 ⟶ GO TO Q.7a

IF 'YES' IN Q.2 ASK:

3a. Having read the garden suite information that we sent you, what is your general impression of garden suites? Would you say you are ... READ LIST -22

Very impressed?----------1 ⟶ ASK Q.3b

Somewhat impressed?----------2 ⟶ ASK Q.3b

Neither impressed or unimpressed?---3 ⟶ GO TO Q.4

Somewhat unimpressed?----------4 ⟶ GO TO Q.4

Very unimpressed?----------5 ⟶ GO TO Q.4

DON'T KNOW----------X ⟶ GO TO Q.4

IF CODES '1' OR '2' IN Q.3a, ASK:

3b. The information package you received included three different photographs and plans of garden suites. Which of the three designs did you prefer the most? **ACCEPT ONE RESPONSE ONLY. PROBE FOR SPECIFIC DESIGN, WHEN NECESSARY. IF RESPONDENT CANNOT REMEMBER, CIRCLE APPROPRIATE CODE.** -23

DESIGN #1 (BRITISH COLUMBIA)-------1 ⟶ ASK Q.3c

DESIGN #2 (QUEBEC)----------2 ⟶ ASK Q.3c

DESIGN #3 (ONTARIO)----------3 ⟶ ASK Q.3c

CAN'T REMEMBER----------4 ⟶ GO TO Q.4

DON'T KNOW----------X ⟶ GO TO Q.4

IF CODES '1', '2' OR '3' IN Q.3b, ASK:

3c. And which design did you prefer the least? ACCEPT ONE RESPONSE ONLY. PROBE FOR SPECIFIC DESIGN, WHEN NECESSARY. IF RESPONDENT CANNOT REMEMBER, CIRCLE APPROPRIATE CODE.

DESIGN #1 (BRITISH COLUMBIA)-------1 -24

DESIGN #2 (QUEBEC)-----------------2

DESIGN #3 (ONTARIO)----------------3

CAN'T REMEMBER---------------------4

DON'T KNOW-------------------------X

IF 'YES' IN Q.2, ASK:

4. On a scale of 1 to 10 where '1' means very poor and '10' means very good. and '5' is the midpoint meaning you are neither positive or negative, how would you rate the <u>following characteristics</u> of the garden suite. illustrated in the information we sent you? Remember, you may choose any number between 1 and 10 that best describes your opinion. READ LIST. ACCEPT ONE RESPONSE PER CHARACTERISTIC.

	<u>VERY POOR</u>									<u>VERY GOOD</u>	DON'T <u>KNOW</u>	
a. Design? (such as exterior appearance, etc.)	1	2	3	4	5	6	7	8	9	10	X	-39
b. Facilities? (such as kitchen, bathroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-40
c. Available space? (roominess in living room, bedroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-41
d. Comfort?	1	2	3	4	5	6	7	8	9	10	X	-42
e. Individual privacy?	1	2	3	4	5	6	7	8	9	10	X	-43

5. What, if anything, do you dislike about the garden suite concept? PROBE. Anything else?

_____ -45-45

_____

_____ 46-47

_____

_____ 48-49

6. I am going to read to you a list of garden suite features and would like you to tell me for each one if it would be very important, important or not important at all to you in considering the garden suite concept? If a feature appeared fine as it was, based on the information we sent you, please say so. **READ LIST. ACCEPT ONE RESPONSE ONLY FOR EACH FEATURE.**

	VERY IMPOR-TANT	IMPOR-TANT	NOT IMPOR-TANT AT ALL	FINE AS WAS	DON'T KNOW	
Wide variety of model types	1	2	3	4	X	-5c
More space than in examples illustrated for ... living room	1	2	3	4	X	
bedroom	1	2	3	4	X	-5a
kitchen	1	2	3	4	X	
storage closets	1	2	3	4	X	-5d
A second bedroom	1	2	3	4	X	
Attractive exterior appearance	1	2	3	4	X	-5e
OTHER (please specify)						
_____ 57-58	1	2	3	4	X	-5g

READ INTRODUCTION ONLY IF 'NO' IN Q.1 OR Q.2:

As you may or may not know, garden suites are small self-contained houses about the size of a double garage, 20 feet by 25 feet, that are usually placed on the same lot as the home of close family members. They are not intended as permanent additions to the lots, are easily movable and can be quickly erected with little disruption to the site. They each have a bedroom, kitchen, bathroom and living room.

ASK EVERYONE:

7a. If the opportunity arose, how likely would it be that your children would want to have a garden suite installed on their property? Would it be ... **READ LIST**

-6a

Very likely?----------1
Somewhat likely?----------2
Neither likely or unlikely?---------3
→ **GO TO Q.8a**

Somewhat unlikely?----------4
Very unlikely?----------5
→ **ASK Q.7b**

DON'T KNOW----------X → **GO TO Q.8a**

IF 'SOMEWHAT UNLIKELY' OR 'VERY UNLIKELY' IN Q.7a, ASK:
7b. Why do you say that? **PROBE:** Any other reasons?

_____ 62-63

_____

_____ 64-65

_____

_____ 66-67

IF RESPONDENT APPEARS TO BE VERY NEGATIVE ABOUT THE CONCEPT, SAY: The information you provide us with will be very helpful in determining future action. Please be patient. Thank you.

ASK EVERYONE:
8a. If you were going to live in a garden suite, would you be more likely to prefer to live in the garden suite ... **READ LIST. ACCEPT ONE RESPONSE ONLY.** -68

On the property of your children?---1 ⟶ **ASK TO Q.8b**

On your property with family, relatives or friends living in your house?----------2

On the property of another relative or friend who lives in your neighbourhood----------3

On the property of another relative or friend who does not live in your neighbourhood----------4 ⟶ **GO TO Q.9**

OTHER (SPECIFY)

_____5

DON'T KNOW----------X

02

IF CODE '1' IN Q.8a, ASK:
8b. What is the city and province where your children live? **MAKE SURE YOU RECORD BOTH CITY AND PROVINCE FOR UP TO THREE CHILDREN, IF APPLICABLE.**

_____ 16-18 CITY

_____ 19 PROVINCE

_____ 20-22 CITY

_____ 23 PROVINCE

_____ 24-26 CITY

_____ 27 PROVINCE

ASK EVERYONE:

9. How would you describe your health? Would you say your health is ... READ LIST. ACCEPT ONE RESPONSE ONLY.

Excellent----------1 -25

Very good----------2

Good----------3

Neither good nor poor----------4

Poor----------5

Very poor----------6

10a. Do you feel you would be comfortable living in a garden suite? -29

YES----------1 ⟶ GO TO Q.11a

NO----------2 ⟶ ASK Q.10b

IF 'NO' IN Q.10a, ASK:

10b. Why do you say that? PROBE: Any other reasons?

_____ 30-31

_____

_____ 32-33

_____

_____ 34-35

ASK EVERYONE:

11a. Which of the following types of support services do you feel would be necessary, in addition to the help your children can provide, if you were to <u>comfortably</u> live in a garden suite? READ LIST. ACCEPT MULTIPLE RESPONSE.

Personal care (such as regular visits from nurse)----------1 -36

Health care (such as visits from doctor when necessary)----------2

Transportation for the elderly available on call when necessary----3

Homecare (such as a housekeeping service)----------4 -39 → ASK Q.11b

Meal preparation----------5

Quick response to requests for help in case of emergencies---------6

Special services for the visual and hearing impaired----------7 -42

NONE----------V

DON'T KNOW----------X -44 → GO TO Q.12

IF CODES '1', '2', '3', '4', '5', '6', OR '7' IN Q.11a, ASK:

11b. What other special needs or services, if any, might be required? **PROBE:** Any others?

_____ 45-46

_____

_____ 47-48

_____

_____ 49-50

NONE----------V

DON'T KNOW----------X

ASK EVERYONE:

12. The cost of purchasing a one-bedroom apartment in the _____ area would be at least $_____ in today's housing market. The probable purchase price for a garden suite in this area would be $_____. Do you think this purchase price for a garden suite is ... **READ LIST. ACCEPT ONE RESPONSE.**

Very high?----------1 -51

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

13. The cost of renting a one-bedroom apartment in the _____ area ranges from about $_____ a month in today's housing market. The probable monthly rent for a garden suite in this area would be $_____. Do you think this monthly rent for a garden suite is **READ LIST. ACCEPT ONE RESPONSE.**

Very high?----------1 -52

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

14. Would you prefer to purchase a garden suite and be able to resell it, when you want to, at a later date or would you prefer to rent a garden suite on a monthly basis? **ACCEPT ONE RESPONSE ONLY.**

PURCHASE GARDEN SUITE----------1 -53

RENT GARDEN SUITE----------2

DON'T KNOW----------X

15a. Would you and your family be able to afford the purchase price of $_____ for a garden suite in your area? -54

YES----------1 ⟶ GO TO Q.16a

NO----------2 ⟶ ASK Q.15b

DON'T KNOW----------X ⟶ ASK Q.15b

IF 'NO' OR 'DON'T KNOW' IN Q.15a, ASK:

15b. How much do you think you could afford to pay towards the purchase price of a garden suite? **PROBE, IF NECESSARY:** Just your best guess in "dollars". **MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.**

$_____ 55-59

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

ASK EVERYONE:

16a. Would you and your family be able to afford the monthly rent of $_____ for a garden suite in your area? -60

YES----------1 ⟶ GO TO Q.17a

NO----------2 ⟶ ASK Q.16b

DON'T KNOW----------X ⟶ ASK Q.16b

IF 'NO' OR 'DON'T KNOW' IN Q.16a, ASK:

16b. How much do you think you could afford to pay towards the monthly rent of a garden suite? **PROBE, IF NECESSARY.** Just your best guess in "dollars". **MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.**

$_____ 61-64

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

03

ASK EVERYONE:

17a. Considering your own situation and what you have recently learned about the garden suite concept, would you be more likely to live in a garden suite on the property of your children or on your own property? **ACCEPT ONE RESPONSE ONLY.**

-7

MORE LIKELY TO LIVE IN A GARDEN SUITE ON THE PROPERTY OF YOUR CHILDREN	1	→ ASK Q.17b
MORE LIKELY TO LIVE IN A GARDEN SUITE ON YOUR OWN PROPERTY	2	→ ASK Q.17b
JUST AS LIKELY TO LIVE IN A GARDEN SUITE ON EITHER PROPERTY (VOLUNTEERED)	3	→ GO TO Q.18a
WOULD NOT LIVE IN A GARDEN SUITE ON EITHER PROPERTY (VOLUNTEERED)	4	→ GO TO Q.19
OTHER (please specify) _____	5	→ GO TO Q.18a
DON'T KNOW	X	→ GO TO Q.18a

IF CODES '1' OR '2' IN Q.17a, ASK:

17b. Why do you say that? **PROBE:** Any other reasons?

8-9

_____

_____

10-11

_____

_____

12-13

IF CODES '1', '2', '3', '5', OR 'X' IN Q.17a, ASK:

18a. If you were to install a garden suite on your property, how likely do you think your neighbours would be to accept it? Would they be ... READ LIST. **PROBE, IF NECESSARY.**

-14

Very likely	1	→ ASK Q.18b
Somewhat likely	2	→ ASK Q.18b
Neither likely or unlikely	3	→ ASK Q.18b
Somewhat unlikely	4	→ ASK Q.18b
Very unlikely	5	→ ASK Q.18b
DON'T KNOW	X	→ GO TO Q.19

IF CODES '1', '2', '3', '4', OR '5' IN Q.18a, ASK:
18b. Why do you say that? PROBE: Any other reasons? RECORD BELOW.

_____ 5-6

_____

_____ 7-8

_____

_____ 9-20

ASK EVERYONE:
19. What is your marital status?

SINGLE----------1 -21
MARRIED----------2
WIDOWED/DIVORCED/SEPARATED----------3
LIVING AS MARRIED----------4

20. What was the language you first spoke in childhood and still understand?

ENGLISH----------1 -25
FRENCH----------2
OTHER (SPECIFY)
_____3

21. What was the highest level of school you completed? READ LIST.

Public or grade school----------1 -26
Some high school----------2
Graduated high school----------3
Community or technical college------4
Some university----------5
Completed university----------6
OTHER (SPECIFY)
_____7
REFUSED----------X

22. Which of the following age categories do you fall into? READ LIST.

60 to 64 years----------1 -28
65 to 69 years----------2
70 to 74 years----------3
75 to 79 years----------4
80 or older----------5
REFUSED----------X

23. Which of the following income groups includes your annual family income, before taxes? **READ LIST.**

Under $15,000----------1 -30

$15,000 - $19,999----------2

$20,000 - $24,999----------3

$25,000 - $29,999----------4

$30,000 - $34,999----------5

$35,000 - $39,999----------6

$40,000 - $44,999----------7

$45,000 - $49,999----------8

$50,000 or over----------9

RETIRED----------V

REFUSED----------X

Thank you very much for taking the time to be interviewed. Your co-operation is most appreciated.

DATE:_____ LENGTH OF INTERVIEW:_____

I hereby certify that this interview was conducted according to the questionnaire and instructions for this study and that the answers recorded are as given to me by this respondent.

I also realize that a portion of my work will be checked back with the respondent for validation.

INTERVIEWER'S SIGNATURE:_____

03

THE CANADIAN GALLUP POLL LTD

PROJECT: 721

GARDEN SUITES VISITORS
- HOST VERSION -

Good...my name is...from the Gallup Poll. May I please speak to...

REINTRODUCE YOURSELF IF NECESSARY AND SAY: Some time ago you visited a demonstration of a new type of accommodation for seniors called garden suites, also called granny flats. At that time you indicated you would not mind answering a few additional questions.

We are doing a follow-up study for the government about garden suites and would like your opinions. Please be patient if you have already answered some of these questions in the questionnaire you filled out at the demonstration site.

1. What was your general impression of the garden suite? Would you say you were...READ LIST

-32

Very impressed	1	
Somewhat impressed	2	
Neither impressed or unimpressed	3	
Somewhat unimpressed	4	
Very unimpressed	5	
DON'T KNOW	X	

2. Do you own or rent your home?

OWN	1	ASK Q.3
RENT	2	THANK & TERMINATE

IF 'OWN' IN Q.2, ASK:

3. What type of house do you own? READ LIST. ACCEPT ONE RESPONSE ONLY

-33

Single detached	1	ASK Q.4
Semi-detached	2	
Townhouse	3	THANK & TERMINATE
Condominium	4	
OTHER (SPECIFY) _____	5	

4. How many of your parents or spouse's parents are sixty years of age or older?

-34

1	1	→ ASK Q.5
2	2	
3	3	
4	4	
NONE/NO PARENTS 60+	5	→ THANK & TERMINATE
NO PARENTS LIVING	6	

IF CODES '1', '2', '3' OR '4' IN Q.4, ASK:

5. Is your property large enough to accommodate an additional building about 20 feet by 25 feet which is the size of a double garage?

YES	1	⟶ ASK Q.6
NO	2	⟶ THANK & TERMINATE

6. The success of this study depends on several factors, the most important being what Canadians, like yourself, have to say about garden suites. To help us to determine future action, we would like to send you some information on garden suites in the mail and then call you back in 2 - 3 weeks to ask you a few more questions.

Would you like to help us?

YES	1	⟶ CONTINUE
NO	2	⟶ THANK & TERMINATE

Thank you!

Would you please give me your name and the address where the additional information should be mailed? **PLEASE PRINT**

NAME: _____

ADDRESS: NO: _____ STREET: _____

CITY: _____ POSTAL CODE: _____

TELEPHONE #: AREA CODE ( ) _____

7. DO NOT ASK BUT RECORD:

SEX OF RESPONDENT:

MALE---------- 1 -35

FEMALE---------- 2

LANGUAGE OF INTERVIEW:

ENGLISH---------- 1 -36

FRENCH---------- 2

PROVINCE OF RESPONDENT:

BRITISH COLUMBIA---------- 1 -37

ALBERTA---------- 2

SASKATCHEWAN---------- 3

MANITOBA---------- 4

ONTARIO---------- 5

QUEBEC---------- 6

NEW BRUNSWICK---------- 7

PEI 8

NOVA SCOTIA 9

NEWFOUNDLAND 0

ASSIGNMENT NUMBER: _____ 38-41

RESPONDENT NUMBER

01

VISITOR OCCUPANT

THE CANADIAN GALLUP POLL LTD

PROJECT: 721

Good ..... my name is ..... from the Gallup Poll. May I please speak to ..... (RESPONDENT WHO VISITED DEMONSTRATION SITE).

REINTRODUCE YOURSELF IF NECESSARY AND SAY: About three weeks ago someone from our office contacted you by telephone and asked you a few questions about a new type of housing accommodation for seniors called garden suites, also called granny flats. At that time you agreed to participate in a short follow-up interview after receiving some additional, more detailed information on garden suite accommodations in the mail.

1. Did you receive this additional information in the mail? -20

YES----------1 ⟶ ASK Q.2

NO----------2 ⟶ GO TO Q.7

IF 'YES' IN Q.1 ASK:

2. Did you read through this information? -21

YES----------1 ⟶ ASK Q.3a

NO----------2 ⟶ GO TO Q.7

IF 'YES' IN Q.2 ASK:

3a. Having read the garden suite information that we sent you, has your impression of garden suites, since the last time we talked, become more favourable, less favourable, or has your impression not changed at all?

MORE FAVOURABLE----------1 -25

LESS FAVOURABLE----------2

NOT CHANGED AT ALL----------3

DON'T KNOW----------X

3b. Why do you say that? PROBE. Any other reasons?

_____ 26-27

_____

_____ 28-29

_____

_____ 30-31

3c. If you were to choose between the garden suite unit you visited at the demonstration site and the units described in the information package we sent you, which would you select? ACCEPT ONE RESPONSE ONLY. PROBE FOR SPECIFIC DESIGN, WHEN NECESSARY. IF RESPONDENT CANNOT REMEMBER, CIRCLE APPROPRIATE CODE.

-32

GARDEN SUITE VISITED----------1

GARDEN SUITES DESCRIBED IN INFORMATION PACKAGE (NO SPECIFIC ONE)----------2

GARDEN SUITE DESCRIBED IN INFORMATION PACKAGE

- DESIGN #1 (BRITISH COLUMBIA)------3
- DESIGN #2 (QUEBEC)----------4
- DESIGN #3 (ONTARIO)----------5

NO PREFERENCE----------6

→ ASK Q.3d

NONE----------V

DON'T KNOW----------X

→ GO TO Q.4

IF CODES '1', '2', '3', '4', '5' OR '6' IN Q.3c, ASK:
3d. Why do you say that? PROBE. Any other reasons?

_____ 33-34

_____

_____ 35-36

_____

_____ 37-38

IF 'YES' IN Q.2, ASK:

4. On a scale of 1 to 10 where '1' means very poor and '10' means very good, and '5' is the midpoint meaning you are neither positive or negative, how would you rate the following characteristics of the garden suite, illustrated in the information we sent you and your visit to the garden suite demonstration site? Remember, you may choose any number between 1 and 10 that best describes your opinion. READ LIST. ACCEPT ONE RESPONSE PER CHARACTERISTIC. IF RESPONDENT WANTS TO GIVE A DIFFERENT CHARACTERISTIC RATING FOR BOTH THE MAILED INFORMATION AND THE SITE VISITED, SAY: "Please base your opinion of each characteristic on your overall opinion of that characteristic."

	VERY POOR									VERY GOOD	DON'T KNOW	
a. Design? (such as exterior appearance, etc.)	1	2	3	4	5	6	7	8	9	10	X	-39
b. Facilities? (such as kitchen, bathroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-40
c. Available space? (roominess in living room, bedroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-41
d. Comfort?	1	2	3	4	5	6	7	8	9	10	X	-42
e. Individual privacy?	1	2	3	4	5	6	7	8	9	10	X	-43

5. What, if anything, do you dislike about the garden suite concept? PROBE. Anything else?

_____ 44-45

_____

_____ 46-47

_____

_____ 48-49

6. I am going to read to you a list of garden suite features and would like you to tell me for each one if it would be very important, important or not important at all to you in considering the garden suite concept? If a feature appeared fine as it was, based on the information we sent you and your visit to the demonstration site, please say so. READ LIST. ACCEPT ONE RESPONSE ONLY FOR EACH FEATURE.

	VERY IMPOR-TANT	IMPOR-TANT	NOT IMPOR-TANT AT ALL	FINE AS WAS	DON'T KNOW	
Wide variety of model types	1	2	3	4	X	-50
More space than in examples illustrated for ... living room	1	2	3	4	X	
bedroom	1	2	3	4	X	-52
kitchen	1	2	3	4	X	
storage closets	1	2	3	4	X	-54
A second bedroom	1	2	3	4	X	
Attractive exterior appearance	1	2	3	4	X	-56
OTHER (please specify)						
_____ 57-58	1	2	3	4	X	-59

READ INTRODUCTION ONLY IF 'NO' IN Q.1 OR Q.2:

As you may or may not know, garden suites are small self-contained houses about the size of a double garage, 20 feet by 25 feet, that are usually placed on the same lot as the home of close family members. They are not intended as permanent additions to the lots, are easily movable and can be quickly erected with little disruption to the site. They each have a bedroom, kitchen, bathroom and living room.

ASK EVERYONE:

7a. If the opportunity arose, how likely would it be that your children would want to have a garden suite installed on their property? Would it be ... READ LIST

-61

Very likely?----------1
Somewhat likely?----------2 → GO TO Q.8a
Neither likely or unlikely?---------3

Somewhat unlikely?----------4
Very unlikely?----------5 → ASK Q.7b

DON'T KNOW----------X → GO TO Q.8a

IF 'SOMEWHAT UNLIKELY' OR 'VERY UNLIKELY' IN Q.7a, ASK:
7b. Why do you say that? PROBE: Any other reasons?

_____ 62-63

_____

_____ 64-65

_____

_____ 66-67

IF RESPONDENT APPEARS TO BE VERY NEGATIVE ABOUT THE CONCEPT, SAY:
The information you provide us with will be very helpful in determining future action. Please be patient. Thank you.

ASK EVERYONE:
8a. If you were going to live in a garden suite, would you be more likely to prefer to live in the garden suite ... READ LIST. ACCEPT ONE RESPONSE ONLY.

16

On the property of your children?------1 ⟶ GO TO Q.8b

On your property with family, relatives or friends living in your house?----------2

On the property of another relative or friend who lives in your neighbourhood----------3

On the property of another relative or friend who does not live in your neighbourhood----------4 ⟶ GO TO Q.9

OTHER (SPECIFY)

_____5

DON'T KNOW----------X

02

IF CODE '1' IN Q.8a, ASK:
8b. What is the city and province where your children live? MAKE SURE YOU RECORD BOTH CITY AND PROVINCE FOR UP TO THREE CHILDREN, IF APPLICABLE.

_____ 18-18 CITY

_____ 19 PROVINCE

_____ 20-22 CITY

_____ 23 PROVINCE

_____ 24-26 CITY

_____ 27 PROVINCE

ASK EVERYONE:

9. How would you describe your health? Would you say your health is ... READ LIST. ACCEPT ONE RESPONSE ONLY.

- Excellent----------1 - 25
- Very good----------2
- Good----------3
- Neither good nor poor----------4
- Poor----------5
- Very poor----------6

10a. Do you feel you would be comfortable living in a garden suite?

- YES----------1 - 29 ⟶ GO TO Q.11a
- NO----------2 ⟶ ASK Q.10b

IF 'NO' IN Q.10a, ASK:

10b. Why do you say that? **PROBE:** Any other reasons?

_____ 30-31

_____

_____ 32-33

_____

_____ 34-35

ASK EVERYONE:

11a. Which of the following types of support services do you feel would be necessary, in addition to the help your children can provide, if you were to <u>comfortably</u> live in a garden suite? **READ LIST. ACCEPT MULTIPLE RESPONSE.**

- Personal care (such as regular visits from nurse)----------1 - 36
- Health care (such as visits from doctor when necessary)----------2
- Transportation for the elderly available on call when necessary----3
- Homecare (such as a housekeeping service)----------4 - 39
- Meal preparation----------5
- Quick response to requests for help in case of emergencies---------6
- Special services for the visual and hearing impaired----------7 - 42

→ ASK Q.11b

- NONE----------V
- DON'T KNOW----------X - 44

→ GO TO Q.12

IF CODES '1', '2', '3', '4', '5', '6' OR '7' IN Q.11a, ASK:

11b. What other special needs or services, if any, might be required? PROBE: Any others?

_____ 45-46

_____

_____ 47-48

_____

_____ 49-50

NONE----------V

DON'T KNOW----------X

ASK EVERYONE:

12. The cost of purchasing a one-bedroom apartment in the _____ area would be at least $_____ in today's housing market. The probable purchase price for a garden suite in this area would be $_____. Do you think this purchase price for a garden suite is ... READ LIST. ACCEPT ONE RESPONSE.

Very high?----------1 -51

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

13. The cost of renting a one-bedroom apartment in the _____ area ranges from about $_____ a month in today's housing market. The probable monthly rent for a garden suite in this area would be $_____. Do you think this monthly rent for a garden suite is ... READ LIST. ACCEPT ONE RESPONSE.

Very high?----------1 -52

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

14. Would you prefer to purchase a garden suite and be able to resell it, when you want to, at a later date or would you prefer to rent a garden suite on a monthly basis? ACCEPT ONE RESPONSE ONLY.

PURCHASE GARDEN SUITE----------1 -53

RENT GARDEN SUITE----------2

DON'T KNOW----------X

15a. Would you and your family be able to afford the purchase price of $_____ for a garden suite in your area? -54

YES----------1 → GO TO Q.16a

NO----------2 → ASK Q.15b

DON'T KNOW----------X → ASK Q.15b

IF 'NO' OR 'DON'T KNOW' IN Q.15a, ASK:

15b. How much do you think you could afford to pay towards the purchase price of a garden suite? PROBE, IF NECESSARY: Just your best guess in "dollars". MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.

$_____ 55-59

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

ASK EVERYONE:

16a. Would you and your family be able to afford the monthly rent of $_____ for a garden suite in your area? -60

YES----------1 → GO TO Q.17a

NO----------2 → ASK Q.16b

DON'T KNOW----------X → ASK Q.16b

IF 'NO' OR 'DON'T KNOW' IN Q.16a, ASK:

16b. How much do you think you could afford to pay towards the monthly rent of a garden suite? PROBE, IF NECESSARY. Just your best guess in "dollars". MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.

$_____ 61-64

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

03

ASK EVERYONE:

17a. Considering your own situation and what you have recently learned about the garden suite concept, would you be more likely to live in a garden suite on the property of your children or on your own property? READ LIST. ACCEPT ONE RESPONSE ONLY.

-7

MORE LIKELY TO LIVE IN A GARDEN SUITE ON THE PROPERTY OF YOUR CHILDREN----------1

MORE LIKELY TO LIVE IN A GARDEN SUITE ON YOUR OWN PROPERTY----------2

→ ASK Q.17b

JUST AS LIKELY TO LIVE IN A GARDEN SUITE ON EITHER PROPERTY (VOLUNTEERED)----------3 → GO TO Q.18a

WOULD NOT LIVE IN A GARDEN SUITE ON EITHER PROPERTY (VOLUNTEERED)----------4 → GO TO Q.19

OTHER (please specify)

_____5

DON'T KNOW----------X

→ GO TO Q.18a

IF CODES '1' OR '2' IN Q.17a, ASK:

17b. Why do you say that? PROBE: Any other reasons?

_____ 8-9

_____

_____ 10-11

_____

_____ 12-13

IF CODES '1','2', '3', '5' OR 'X' IN Q.17a, ASK:

18a. If a garden suite was installed on your property, how likely do you think your neighbours would be to accept it? Would they be ... READ LIST. PROBE, IF NECESSARY.

-14

Very likely----------1

Somewhat likely----------2

Neither likely or unlikely----------3

Somewhat unlikely----------4

Very unlikely----------5

→ ASK Q.18b

DON'T KNOW----------X → GO TO Q.19

IF CODES '1', '2', '3', '4' OR '5' IN Q.18a, ASK:

18b. Why do you say that? PROBE: Any other reasons? RECORD BELOW.

_____ 15-16

_____

_____ 17-18

_____

_____ 19-20

ASK EVERYONE:

19. What is your marital status?

SINGLE----------1 -21

MARRIED----------2

WIDOWED/DIVORCED/SEPARATED----------3

LIVING AS MARRIED----------4

20. What was the language you first spoke in childhood and still understand?

ENGLISH----------1 -25

FRENCH----------2

OTHER (SPECIFY)

_____3

21. What was the highest level of school you completed? READ LIST.

Public or grade school----------1 -26

Some high school----------2

Graduated high school----------3

Community or technical college------4

Some university----------5

Completed university----------6

OTHER (SPECIFY)

_____7

REFUSED----------X

22. Which of the following age categories do you fall into? READ LIST.

-28

60 to 64 years----------1
65 to 69 years----------2
70 to 74 years----------3
75 to 79 years----------4
80 or older----------5
REFUSED----------X

23. Which of the following income groups includes your annual family income, before taxes? READ LIST.

-30

Under $15,000----------1
$15,000 - $19,999----------2
$20,000 - $24,999----------3
$25,000 - $29,999----------4
$30,000 - $34,999----------5
$35,000 - $39,999----------6
$40,000 - $44,999----------7
$45,000 - $49,999----------8
$50,000 or over----------9
RETIRED (VOLUNTEERED)----------V
REFUSED----------X

Thank you very much for taking the time to be interviewed. Your co-operation is most appreciated.

DATE:_____ LENGTH OF INTERVIEW:_____

I hereby certify that this interview was conducted according to the questionnaire and instructions for this study and that the answers recorded are as given to me by this respondent.

I also realize that a portion of my work will be checked back with the respondent for validation.

INTERVIEWER'S SIGNATURE:_____

THE CANADIAN GALLUP POLL LTD PROJECT: 721

GARDEN SUITES VISITORS
- OCCUPANT VERSION -

Good...my name is...from the Gallup Poll. May I please speak to...

REINTRODUCE YOURSELF IF NECESSARY AND SAY: Some time ago you visited a demonstration of a new type of accommodation for seniors called garden suites, also called granny flats. At that time you indicated you would not mind answering a few additional questions.

We are doing a follow-up study for the government about garden suites and would like your opinions. Please be patient if you have already answered some of these questions in the questionnaire you filled out at the demonstration site.

1. What was your general impression of the garden suite? Would you say you were...READ LIST

Very impressed	1	-32
Somewhat impressed	2	
Neither impressed or unimpressed	3	
Somewhat unimpressed	4	
Very unimpressed	5	
DON'T KNOW	X	

2a. Do you have any children?

YES	1 ——>	ASK Q.2b
NO	2 ——>	THANK & TERMINATE

2b. Do any of them own a single or semi-detached home?

YES	1 ——>	ASK Q.2c
NO	2 ——>	THANK & TERMINATE

2c. Is the property of any one of your children large enough to accommodate an additional building about 20 feet by 25 feet which is the size of a double garage?

YES	1 ——>	CONTINUE
NO	2 ——>	THANK & TERMINATE

3. The success of this study depends on several factors, the most important being what Canadians, like yourself, have to say about garden suites. To help us to determine future action, we would like to send you some information on garden suites in the mail and then call you back in 2 - 3 weeks to ask you a few more questions.

Would you like to help us?

YES---------- 1 ⟶ CONTINUE

NO---------- 2 ⟶ THANK & TERMINATE

Thank you!

Would you please give me your name and the address where the additional information should be mailed? **PLEASE PRINT**

NAME: _____

ADDRESS: NO: _____ STREET: _____

CITY: _____ POSTAL CODE: _____

TELEPHONE #: AREA CODE ( ) _____

4. **DO NOT ASK BUT RECORD:**

SEX OF RESPONDENT:

MALE---------- 1 -35

FEMALE---------- 2

LANGUAGE OF INTERVIEW:

ENGLISH---------- 1 -36

FRENCH---------- 2

PROVINCE OF RESPONDENT:

BRITISH COLUMBIA---------- 1 -37

ALBERTA---------- 2

SASKATCHEWAN---------- 3

MANITOBA---------- 4

ONTARIO---------- 5

QUEBEC---------- 6

NEW BRUNSWICK---------- 7

PEI 8

NOVA SCOTIA 9

NEWFOUNDLAND 0

ASSIGNMENT NUMBER: _____ 38-41

RESPONDENT NUMBER

01

VISITOR HOST

THE CANADIAN GALLUP POLL LTD PROJECT: 721

Good ..... my name is ..... from the Gallup Poll. May I please speak to ..... (RESPONDENT WHO VISITED DEMONSTRATION SITE).

REINTRODUCE YOURSELF IF NECESSARY AND SAY: About three weeks ago someone from our office contacted you by telephone and asked you a few questions about a new type of housing accommodation for seniors called garden suites, also called granny flats. At that time you agreed to participate in a short follow-up interview after receiving some additional, more detailed information on garden suite accommodations in the mail.

1. Did you receive this additional information in the mail? -20

YES----------1 ⟶ ASK Q.2

NO----------2 ⟶ GO TO Q.7

IF 'YES' IN Q.1 ASK:

2. Did you read through this information? -21

YES----------1 ⟶ ASK Q.3a

NO----------2 ⟶ GO TO Q.7

IF 'YES' IN Q.2 ASK:

3a. Having read the garden suite information that we sent you, has your impression of garden suites, since the last time we talked, become more favourable, less favourable, or has your impression not changed at all?

MORE FAVOURABLE----------1 -25

LESS FAVOURABLE----------2

NOT CHANGED AT ALL----------3

DON'T KNOW----------X

3b. Why do you say that? PROBE. Any other reasons?

_____ 26-27

_____

_____ 28-29

_____

_____ 30-31

3c. If you were to choose between the garden suite unit you visited at the demonstration site and the units described in the information package we sent you, which would you select? ACCEPT ONE RESPONSE ONLY. PROBE FOR SPECIFIC DESIGN, WHEN NECESSARY. IF RESPONDENT CANNOT REMEMBER, CIRCLE APPROPRIATE CODE.

-32

GARDEN SUITE VISITED----------1

GARDEN SUITES DESCRIBED IN INFORMATION PACKAGE (NO SPECIFIC ONE)----------2

GARDEN SUITE DESCRIBED IN INFORMATION PACKAGE

- DESIGN #1 (BRITISH COLUMBIA)------3

- DESIGN #2 (QUEBEC)----------4

- DESIGN #3 (ONTARIO)----------5

NO PREFERENCE----------6

→ ASK Q.3d

NONE----------V

DON'T KNOW----------X

→ GO TO Q.4

IF CODES '1', '2', '3', '4', '5' OR '6' IN Q.3c, ASK:

3d. Why do you say that? PROBE. Any other reasons?

_____ 33-34

_____

_____ 35-36

_____

_____ 37-38

IF 'YES' IN Q.2, ASK:

4. On a scale of 1 to 10 where '1' means very poor and '10' means very good, and '5' is the midpoint meaning you are neither positive or negative, how would you rate the following characteristics of the garden suite, illustrated in the information we sent you? Remember, you may choose any number between 1 and 10 that best describes your opinion. READ LIST. ACCEPT ONE RESPONSE PER CHARACTERISTIC. IF RESPONDENT WANTS TO GIVE A DIFFERENT CHARACTERISTIC RATING FOR BOTH THE MAILED INFORMATION AND THE SITE VISITED, SAY: "Please base your opinion of each characteristic on your overall opinion of that characteristic."

	VERY POOR									VERY GOOD	DON'T KNOW	
a. Design? (such as exterior appearance, etc.)	1	2	3	4	5	6	7	8	9	10	X	-39
b. Facilities? (such as kitchen, bathroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-40
c. Available space? (roominess in living room, bedroom, etc.)	1	2	3	4	5	6	7	8	9	10	X	-41
d. Comfort?	1	2	3	4	5	6	7	8	9	10	X	-42
e. Individual privacy?	1	2	3	4	5	6	7	8	9	10	X	-43

5. What, if anything, do you dislike about the garden suite concept? PROBE. Anything else?

_____ 44-45

_____

_____ 46-47

_____

_____ 48-49

6. I am going to read to you a list of garden suite features and would like you to tell me for each one if it would be very important, important or not important at all to you in considering the garden suite concept? If a feature appeared fine as it was, based on the information we sent you and your visit to the demonstration site, please say so. **READ LIST. ACCEPT ONE RESPONSE ONLY FOR EACH FEATURE.**

	VERY IMPOR-TANT	IMPOR-TANT	NOT IMPOR-TANT AT ALL	FINE AS WAS	DON'T KNOW	
Wide variety of model types	1	2	3	4	X	-50
More space than in examples illustrated for ... living room	1	2	3	4	X	
bedroom	1	2	3	4	X	-52
kitchen	1	2	3	4	X	
storage closets	1	2	3	4	X	-54
A second bedroom	1	2	3	4	X	
Attractive exterior appearance	1	2	3	4	X	-56
OTHER (please specify)						
_____ 57-58	1	2	3	4	X	-59

READ INTRODUCTION ONLY IF 'NO' IN Q.1 OR Q.2:

As you may or may not know, garden suites are small self-contained houses about the size of a double garage, 20 feet by 25 feet, that are usually placed on the same lot as the home of close family members. They are not intended as permanent additions to the lots, are easily movable and can be quickly erected with little disruption to the site. They each have a bedroom, kitchen, bathroom and living room.

ASK EVERYONE:

7. Do any of your parents or spouse's parents presently live in your home?

YES----------1 -60
NO----------2

8a. If the opportunity arose, how likely would it be that your parents or spouse's parents would want to live in a garden suite? Would it be ... **READ LIST**

-61

Very likely?----------1
Somewhat likely?----------2 → GO TO Q.9a
Neither likely or unlikely?----------3
Somewhat unlikely?----------4
Very unlikely?----------5 → ASK Q.8b
DON'T KNOW----------X → GO TO Q.9a

IF 'SOMEWHAT UNLIKELY' OR 'VERY UNLIKELY' IN Q.8a, ASK:
8b. Why do you say that? PROBE: Any other reasons?

_____ 62-63

_____

_____ 64-65

_____

_____ 66-67

IF RESPONDENT APPEARS TO BE VERY NEGATIVE ABOUT THE CONCEPT, SAY:
The information you provide us with will be very helpful in determining future action. Please be patient. Thank you.

ASK EVERYONE:
9a. If your parents or spouse's parents were going to live in a garden suite, would they be more likely to prefer to live in the garden suite ... READ LIST. ACCEPT ONE RESPONSE ONLY.

-68

On your property?----------1	⟶	GO TO Q.10a
On their property with family, relatives or friends living in their house?----------2	⟶	ASK Q.9b, Q.9c
On the property of another relative or friend who lives in your parents' neighbourhood----------3	⟶	GO TO Q.10a
On the property of another relative or friend who does not live in your parents' neighbourhood----------4	⟶	GO TO Q.10a
OTHER (SPECIFY) _____ 5	⟶	GO TO Q.10a
DON'T KNOW----------X	⟶	GO TO Q.10a

02

IF CODE '2' IN Q.9a, ASK:
9b. What is the city and province where your parents live? MAKE SURE YOU RECORD BOTH CITY AND PROVINCE.

_____ 7-10 CITY

_____ 11 PROVINCE

9c. What is the city and province where your spouse's parents live? MAKE SURE YOU RECORD BOTH CITY AND PROVINCE.

_____ 12-14 CITY

_____ 15 PROVINCE

ASK EVERYONE:

10a. Do you feel your parents or spouse's parents would be comfortable living in a garden suite?

-29

YES----------1 ⟶ **GO TO Q.11a**

NO----------2 ⟶ **ASK Q.10b**

IF 'NO' IN Q.10a, ASK:

10b. Why do you say that? **PROBE: Any other reasons?**

_____ 30-31

_____

_____ 32-33

_____

_____ 34-35

ASK EVERYONE:

11a. Which of the following types of support services do you feel would be necessary, in addition to the help that you can provide, if any of your parents or spouse's parents were to <u>comfortably</u> live in a garden suite? **READ LIST. ACCEPT MULTIPLE RESPONSE.**

Personal care (such as regular visits from nurse)----------1 -36

Health care (such as visits from doctor when necessary)----------2

Transportation for the elderly available on call when necessary----3

Homecare (such as a housekeeping service)----------4 -39

Meal preparation----------5

Quick response to requests for help in case of emergencies---------6

Special services for the visual and hearing impaired----------7 -42

→ **ASK Q.11b**

NONE----------V

DON'T KNOW----------X -44

→ **GO TO Q.12**

IF CODES '1', '2', '3', '4', '5', '6', OR '7' IN Q.11a, ASK:

11b. What other special needs or services, if any, might be required? **PROBE:** Any others?

_____ 45-46

_____

_____ 47-48

_____

_____ 49-50

NONE----------V

DON'T KNOW----------X

ASK EVERYONE:

12. The cost of purchasing a one-bedroom apartment in the _____ area would be at least $_____ in today's housing market. The probable purchase price for a garden suite in this area would be $_____. Do you think this purchase price for a garden suite is ... READ LIST. **ACCEPT ONE RESPONSE.**

Very high?----------1 -51

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

13. The cost of renting a one-bedroom apartment in the _____ area ranges from about $_____ a month in today's housing market. The probable monthly rent for a garden suite in this area would be $_____. Do you think this monthly rent for a garden suite is ... READ LIST. **ACCEPT ONE RESPONSE.**

Very high?----------1 -52

Somewhat high?----------2

About right?----------3

Somewhat low?----------4

Very low?----------5

DON'T KNOW----------X

14. Would you prefer to purchase a garden suite and be able to resell it, when you want to, at a later date or would you prefer to rent a garden suite on a monthly basis? **ACCEPT ONE RESPONSE ONLY.**

PURCHASE GARDEN SUITE----------1 -53

RENT GARDEN SUITE----------2

DON'T KNOW----------X

15a. Would you and your family be able to afford the purchase price of $_____ for a garden suite in your area?

-54

YES----------1 ⟶ GO TO Q.16a

NO----------2 ⟶ ASK Q.15b

DON'T KNOW----------X ⟶ ASK Q.15b

IF 'NO' OR 'DON'T KNOW' IN Q.15a, ASK:

15b. How much do you think you could afford to pay towards the purchase price of a garden suite? **PROBE, IF NECESSARY:** Just your best guess in "dollars". **MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.**

$_____ 55-59

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

ASK EVERYONE:

16a. Would you and your family be able to afford the monthly rent of $_____ for a garden suite in your area?

-60

YES----------1 ⟶ GO TO Q.17a

NO----------2 ⟶ ASK Q.16b

DON'T KNOW----------X ⟶ ASK Q.16b

IF 'NO' OR 'DON'T KNOW' IN Q.16a, ASK:

16b. How much do you think you could afford to pay towards the monthly rent of a garden suite? **PROBE, IF NECESSARY.** Just your best guess in "dollars". **MAKE SURE RESPONDENT GIVES AMOUNT IN DOLLARS.**

$_____ 61-64

NONE/NOT ABLE TO AFFORD AT ALL------V

DON'T KNOW----------X

ASK EVERYONE:

17a. Considering your own family situation and what you have recently learned about the garden suite concept, how likely is it that you would have a garden suite installed on your property? Would it be ... READ LIST. **ACCEPT ONE RESPONSE ONLY.**

-65

Very likely?----------1 ⟶ GO TO Q.18a

Somewhat likely?----------2 ⟶ GO TO Q.18a

Neither likely or unlikely?---------3 ⟶ GO TO Q.18a

Somewhat unlikely?----------4 ⟶ ASK Q.17b

Very unlikely?----------5 ⟶ ASK Q.17b

DON'T KNOW----------X ⟶ GO TO Q.18a

IF 'SOMEWHAT UNLIKELY' OR 'VERY UNLIKELY' IN Q.17a ASK:
17b. Why do you say that? **PROBE:** Any other reasons?

_____ 66-67

_____

_____ 68-69

_____

_____ 70-71

03

ASK EVERYONE:
18a. If you were to install a garden suite on your property, how likely do you think your neighbours would be to accept it? Would they be ... **READ LIST. PROBE, IF NECESSARY.**

-14

Very likely----------1 ┐
Somewhat likely----------2 │
Neither likely or unlikely----------3 ──→ **ASK Q.18b**
Somewhat unlikely----------4 │
Very unlikely----------5 ┘
DON'T KNOW----------X ──→ **GO TO Q.19**

IF CODES '1', '2', '3', '4' OR '5' IN Q.18a, ASK:
18b. Why do you say that? **PROBE:** Any other reasons? **RECORD BELOW.**

_____ 15-16

_____

_____ 17-18

_____

_____ 19-20

ASK EVERYONE:
19. What is your marital status?

SINGLE----------1 -21
MARRIED----------2
WIDOWED/DIVORCED/SEPARATED----------3
LIVING AS MARRIED----------4

20a. How many people, including yourself, are there in your household?

1 2 3 4 5 6 or more -22

└──→ **GO TO Q.21**

20b. How many would be under 10 years?

0 1 2 3 4 or more -23

20c. How many would be between 10 and 17 years?

0 1 2 3 4 or more - 24

21. What was the language you first spoke in childhood and still understand?

ENGLISH----------1 -25

FRENCH----------2

OTHER (SPECIFY)

_____3

22. What was the highest level of school you completed? READ LIST.

Public or grade school----------1 -26

Some high school----------2

Graduated high school----------3

Community or technical college------4

Some university----------5

Completed university----------6

OTHER (SPECIFY)

_____7

REFUSED----------X

23. Which of the following age categories do you fall into? READ LIST.

18 to 24 years----------1 -27

25 to 29 years----------2

30 to 34 years----------3

35 to 39 years----------4

40 to 44 years----------5

45 to 49 years----------6

50 to 54 years----------7

55 to 59 years----------8

REFUSED----------X

24. Which of the following income groups includes your annual family income, before taxes? **READ LIST.**

Under $20,000----------1 -29

$20,000 - $24,999----------2

$25,000 - $29,999----------3

$30,000 - $34,999----------4

$35,000 - $39,999----------5

$40,000 - $44,999----------6

$45,000 - $49,999----------7

$50,000 or over----------8

REFUSED----------X

Thank you very much for taking the time to be interviewed. Your co-operation is most appreciated.

DATE:_____ LENGTH OF INTERVIEW:_____

I hereby certify that this interview was conducted according to the questionnaire and instructions for this study and that the answers recorded are as given to me by this respondent.

I also realize that a portion of my work will be checked back with the respondent for validation.

INTERVIEWER'S SIGNATURE:_____

APPENDIX II

INFORMATION PACKAGE

Dear Respondent:

You were recently interviewed by telephone by the Canadian Gallup Poll and asked a few questions about a new type of housing accommodation for seniors called garden suites, also called granny flats. At that time you agreed to participate in a short follow-up interview after receiving some additional information on garden suite accommodations in the mail.

The information included in this mail-out explains the garden suite concept in more detail and is intended to give you a better understanding of the size, features and appearance of garden suites.

We hope you find the material provided in this mailing interesting. Please read through it.

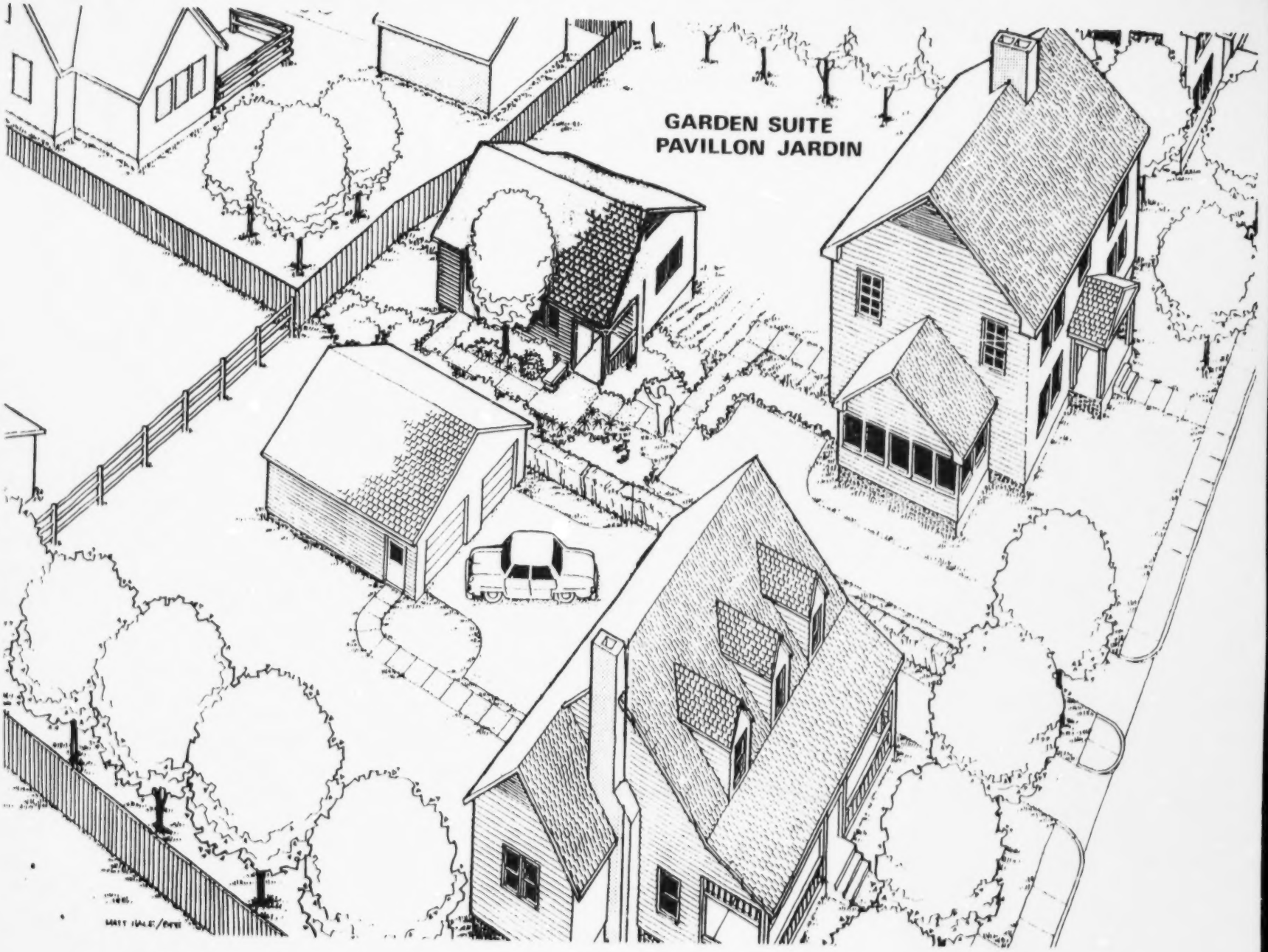
We look forward to talking with you again in about ten days.

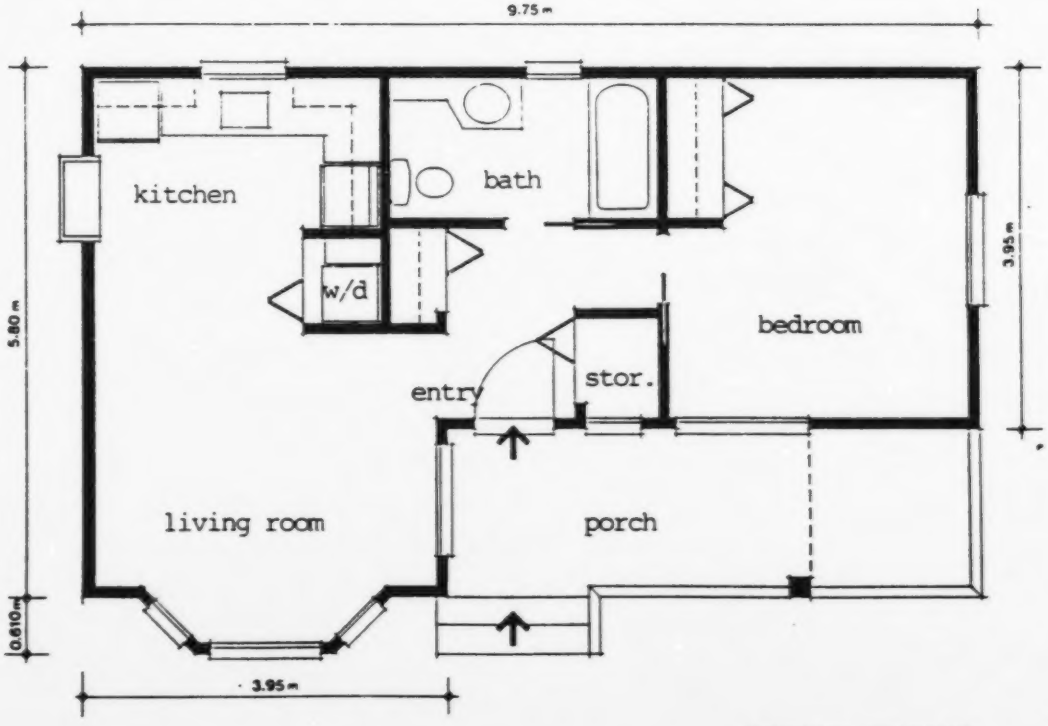
Best regards,

John Bylok
Assistant Research Director

JB/wg
Encl.

USR\08-03.JB

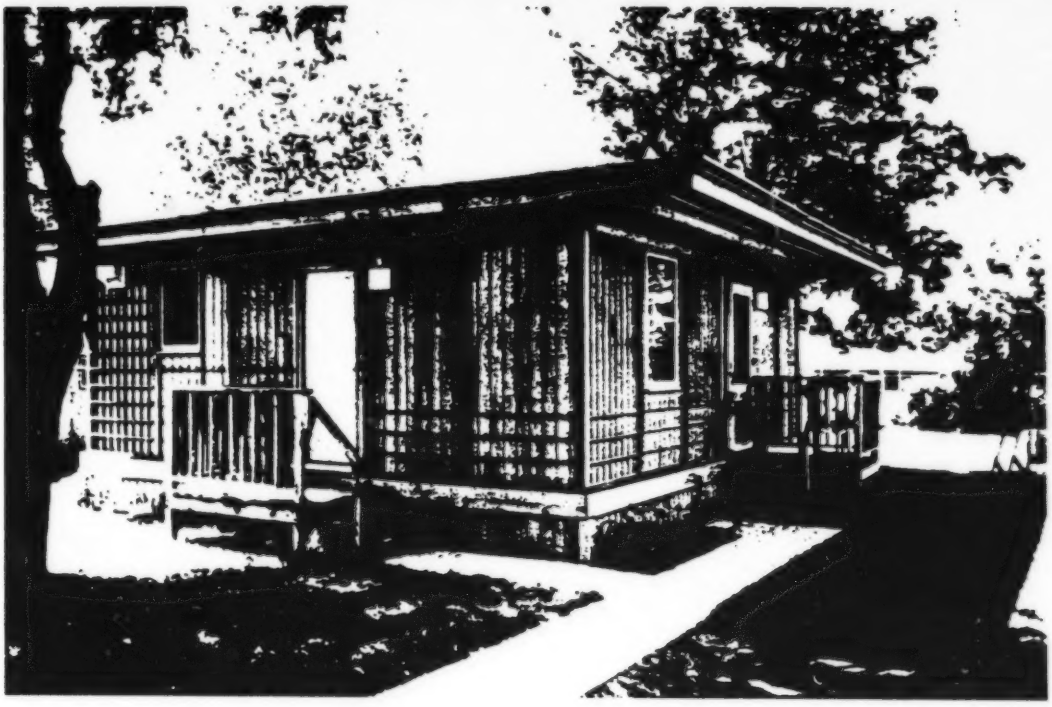

GARDEN SUITE
PAVILLON JARDIN



BRITISH COLUMBIA

7.30 m
kitchen
bedroom
w/d
lin.
dining
bath
entry
storage
living room
porch
8.25 m
1.50 m
3.65 m

QUEBEC



6800
bathrm
bedroom
W/d
mech.
kitchen
7900
livingroom
entry
up

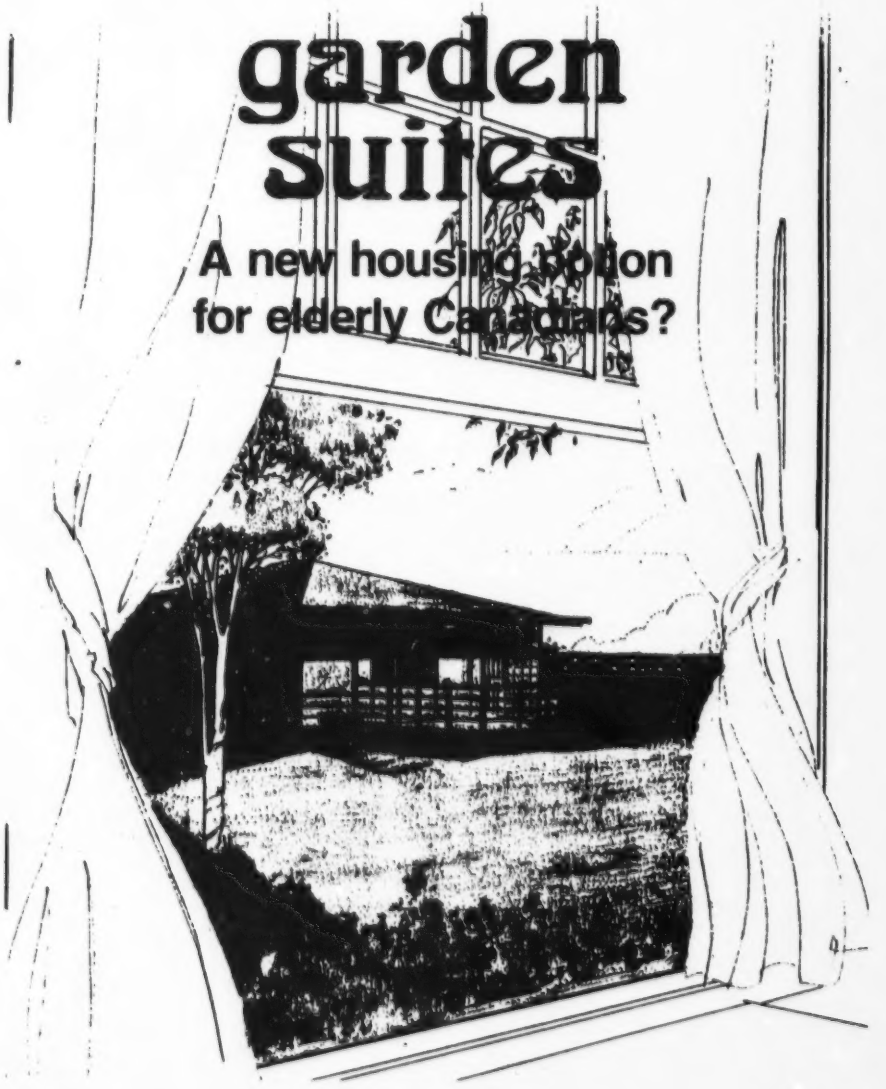
ONTARIO

Canada Mortgage and Housing Corporation

Société canadienne d'hypothèques et de logement

garden suites

A new housing option for elderly Canadians?



A new housing option for elderly Canadians?

Canada's elderly population will increase significantly during the next thirty-five years. More and more elderly people are going to be looking for new types of affordable accommodation. What they want is housing that provides them with choices during the later stages of their lives. Institutional care will always be needed for some elderly people incapable of caring for themselves, but the vast majority want to continue to live independently. Garden suites, which provide elderly people with the added security and convenience of living close to the people and communities important to them, may be one answer to their needs.

What Is a Garden Suite?

Garden suites are small self-contained houses that are placed on the same lot as the home of close family members. They are designed for elderly people who want to live close to their married children, while maintaining their independence and privacy. Most suites have one bedroom, a living room, a kitchen and a bathroom, as well as storage and laundry facilities and all the usual amenities of a home. The garden suite was first developed in Australia, where this type of accommodation has proved to be popular in both rural and urban areas.

The suites are not intended as permanent additions to the lots and are designed so that they are easily movable.

Garden suites are usually factory-built, and can be erected quickly with little disruption at the site.

What Is the Purpose of this Demonstration of Garden Suites?

The garden suite idea is new to Canada, and both industry and governments are seeking a better understanding of the opportunities for garden suites in this country. This demonstration is intended to provide Canadians with a chance to visit a garden suite. They can then see whether this form of accommodation would meet their needs and satisfy their expectations for comfort and security. Feedback from people who visit the suites will help in assessing how well the idea would be accepted and what design features would prove to be most popular.

It will also be important to gain acceptance of garden suites from the occupants of neighbouring homes and from the community. The demonstration will give municipal planners, and potential neighbours, a better understanding of how garden suites will look and the ways in which they will be used.

Why Is a Garden Suite a Good Idea?

For occupants and host families

Garden suites allow elderly people the pleasure and convenience of living close to their families while maintaining their own self-contained dwelling. They also enable the families of elderly people to help and support their elderly parents without the need to provide accommodation in their own houses, which is, in many cases, impossible or impracticable. Garden suites may also provide more opportunities for elderly people to continue to live in their own neighbourhoods and maintain their ties to friends and familiar services and facilities.

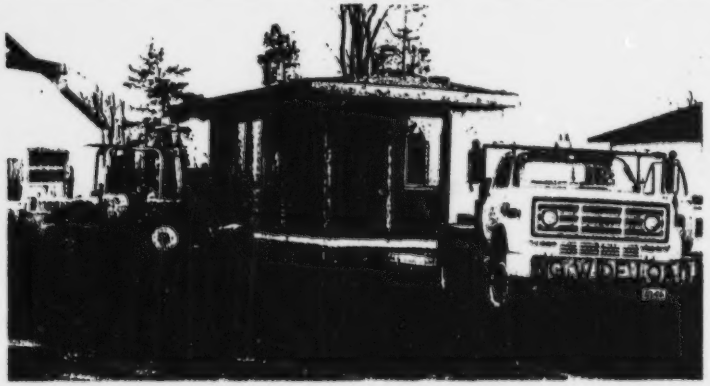
Some elderly people may also prefer the detached garden suite dwelling to an apartment or a suite in a nursing home, and it may prove to be more affordable. If they need to move to another form of dwelling later -- a nursing home, for example — the garden suite, because of its portability, can be moved to another host site to serve a different resident.

For governments

Governments are interested in adding to the range of affordable accommodation for elderly people that allows them to remain financially self-sufficient. This will help control the levels of subsidies needed for accommodation and support services.

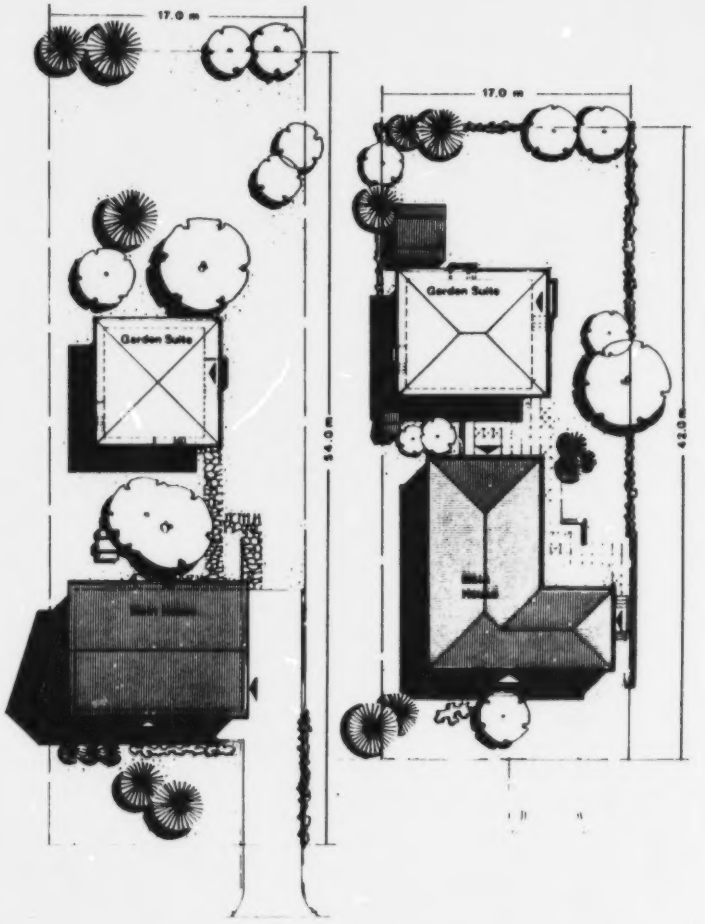
For Industry

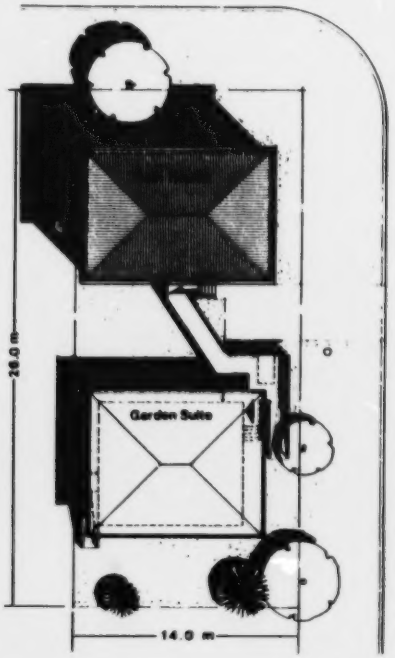
The manufactured housing industry is ready to respond to any new markets for garden suites. Factory-built dwellings are easily portable, can incorporate all desirable design features and facilities, and can be quickly installed and removed with little disruption to host families' lots.



Where Can Garden Suites Be Located?

It is easier to locate garden suites on the large lots found in rural areas, but this does not mean they are suitable only for rural locations. In fact, the greatest potential markets for this type of accommodation are in urban areas. However, not all urban lots can accommodate garden suites. Many are too small and some are already being used for other purposes — a





swimming pool, for example. Urban lots also tend to have restrictive covenants or easements, or they may lack accessibility. Nevertheless, many town and suburban lots are quite suitable for garden suites.

An important consideration in deciding whether a garden suite will provide appropriate accommodation is the type of support the elderly occupant may require. If people living in garden suites require more services than those provided by their families, then it will be necessary to check that such services are available in the community before opting for a garden suite.

Are Garden Suites Available Now?

At the moment, few, if any, municipalities permit the installation of a garden suite on the lot of an existing dwelling. It may be possible to obtain temporary occupancy permits to locate second dwellings on existing house lots in some rural areas, but this is not common practice. Until satisfactory ways of regulating garden suites are developed, and adopted by municipalities, this form of accommodation cannot be used in most parts of Canada.

CMHC is carrying out a survey intended to provide a realistic assessment of the potential market for garden suites. Studies are also being undertaken to find ways of ensuring that garden suites would not disturb the appearance and character of a neighbourhood. Other studies are examining various ways of marketing garden suites; different methods of connecting them to utility services; the costs of different methods of constructing, delivering and assembling units; and the important relationships between this type of accommodation and the availability of support services in a community.

If these initiatives lead to the conclusion that there could be significant markets for garden suites in Canada, CMHC will develop recommendations and guidelines for their marketing and regulation. It is hoped that these will provide municipalities with a sound basis for accepting garden suites and will help open up opportunities for their widespread use in Canada.

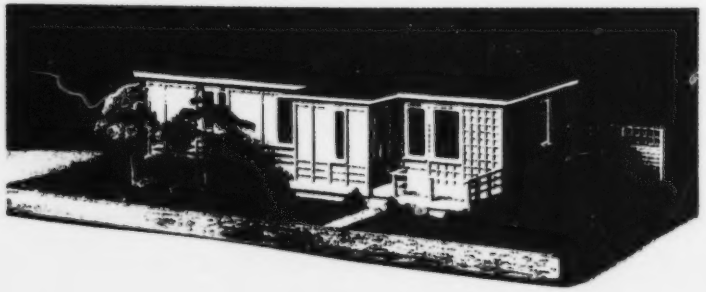
Are All Garden Suites the Same?

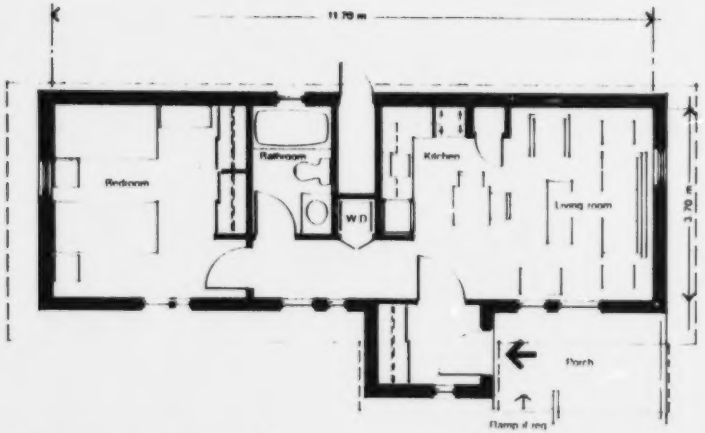
Garden suite designs can be varied to meet the needs and preferences of occupants and host families, to suit house lots of different shapes and sizes, and to blend with surrounding dwellings.

Both single and double-width units are included in

this demonstration and floor plans have been developed to illustrate other possible designs.

Single-width units are usually 4.25 or 4.9 metres wide, depending on permissable transportation widths in a province. They are manufactured in one complete module and will range from 10.5 to 12 metres in length. For a given floor area, this is probably the most inexpensive type of unit.

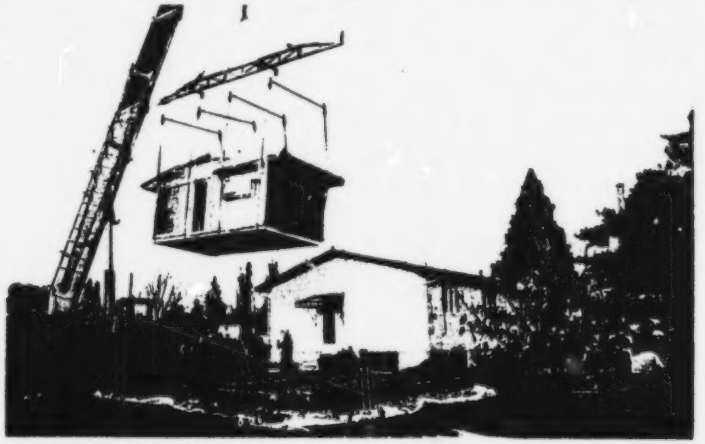




Floor plan of above model

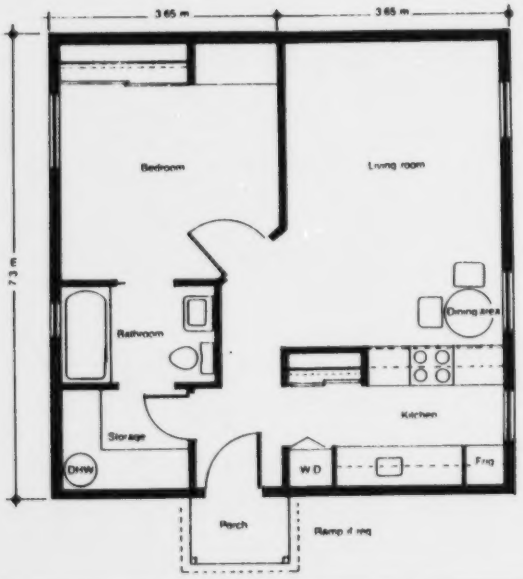
If a squarer shape is preferred, a double-width unit can be manufactured and delivered in two sections, which are joined together at the site. The smaller size of these sections may make them easier to move into a backyard with limited accessibility.

A variety of other shapes, such as "L" and "T", can be produced, using two sections. These designs may be more appealing to some people, or may be easier to accommodate on a particular lot.



For lots where it would be impractical to move a one or two-section unit into position, the units could be manufactured in panels. These panels can be more easily moved into position, but a greater amount of site time is required to erect the panels and complete the finishing and installation work.

It is expected that most garden suites will be one-bedroom units with floor areas ranging between 50 and 55 square metres. However, in special circumstances, bachelor-type units with floor areas as small



as 40 square metres could be used. Larger units, some with two bedrooms, could be provided for elderly couples if large enough lots are available.

All garden suites should be designed to permit wheelchair accessibility, in case the need should arise. However, access ramps need only be installed as and when required. The functional design of the units and fixtures should reflect recommended standards for senior citizens' dwellings.

Widespread acceptance of garden suites could very much depend on how well they can be made to blend with existing neighbourhoods. The selection of suitable heights, roof shapes and exterior finishes is therefore very important. Fortunately, factory-built units can meet this need for a variety of designs and finishes.

As with any type of accommodation, individual tastes and affordability will also influence the choice of finishes and fixtures in garden suites.

Who Is Sponsoring this Demonstration?

Government housing agencies are well aware of the growing number of elderly people in Canada. Their main objective is to provide a wide choice of suitable accommodation that will help keep elderly people independent as long as possible. Because the garden suite meets this need, both government agencies and industry feel that its potential is worth exploring. This is why the manufactured housing industry, provincial housing agencies and Canada Mortgage and Housing Corporation agreed to co-operate in sponsoring and mounting this demonstration.

List of Participants

Canada Mortgage and Housing Corporation (CMHC)

Canadian Manufactured Housing Institute (CMHI)

Société d'habitation du Québec (SHQ)

Ontario Ministry of Housing

British Columbia Housing Commission

Manitoba Department of Housing

Saskatchewan Housing Corporation

Nova Scotia Department of Housing

Alberta Ministry of Municipal Affairs and Housing

New Brunswick Housing Corporation

Associations

The Alberta and Saskatchewan Manufactured Housing Association

The British Columbia Manufactured Housing Association

Société québécoise de manufacturiers d'habitation

New Brunswick Manufactured Homes and Parks Association Inc.

Mobile Home, Travel Trailer, Parks Association of Nova Scotia

APPENDIX III

REGIONAL RENTAL/PURCHASE PRICES

PRICES OF GARDEN SUITE UNITS
Q.12, Q.15a

TYPE	UNIT PRICE
British Columbia	$ 37,000
Alberta	$ 33,000
Saskatchewan	$ 30,000
Manitoba	$ 29,000
New Brunswick	$ 33,000
Quebec	$ 36,000
Ontario	$ 37,000

PURCHASE PRICE OF ONE-BEDROOM APARTMENT
(Reflects lower end of market)
Q.12

BRITISH COLUMBIA	Vancouver	$ 68,500
	Victoria	$ 66,500
	Kelowna	$ 49,000
ALBERTA	Calgary	$ 46,500
	Edmonton	$ 46,500
	Lethbridge	$ 46,500
SASKATCHEWAN	Regina	$ 50,000
	Saskatoon	$ 50,000
MANITOBA	Winnipeg	$ 73,000
NEW BRUNSWICK	Fredericton	$ 48,000
	Moncton	$ 48,000
	St. John	$ 48,000
QUEBEC	Montreal	$ 55,000
	Quebec	$ 52,000
	Hull	$ 52,000
	Chicoutimi	$ 52,000
ONTARIO	Toronto	$ 75,000
	Ottawa	$ 64,500
	Windsor	$ 60,000
	Oshawa	$ 68,500
	London	$ 55,000
	Thunder Bay	$ 54,000
	St. Catharines	$ 59,000
	Kitchener	$ 59,000
	Hamilton	$ 59,000
	Sudbury	$ 54,000

RENTS FOR ONE-BEDROOM UNIT APARTMENT PER MONTH
Q.13

	MAJOR URBAN CENTRES			
BRITISH COLUMBIA	Vancouver	260	to	1,000
	Victoria	250	to	700
	Kelowna	260	to	440
ALBERTA	Calgary	250	to	900
	Edmonton	250	to	1,000
SASKATCHEWAN	Regina	170	to	600
	Saskatoon	150	to	600
MANITOBA	Winnipeg	150	to	700
NEW BRUNSWICK	Fredericton	200	to	800
	Moncton	200	to	620
	St. John	200	to	580
QUEBEC	Montreal	250	to	1,200
	Quebec	200	to	1,200
	Hull	200	to	650
	Chicoutimi	230	to	430
ONTARIO	Toronto	300	to	2,200
	Ottawa	250	to	1,000
	Windsor	300	to	1,000
	Oshawa	300	to	700
	London	300	to	700
	Thunder Bay	230	to	600
	St. Catharines	260	to	700
	Kitchener	260	to	620
	Hamilton	260	to	800
	Sudbury	200	to	620

RENT FOR GARDEN SUITE PER MONTH
$450 TO $550
Q.13, 16a